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AUTHOR Chesterfield, Ray: And Others
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ABSTRACT

This report provides information on feedback from a consultant panel concerning the initial phase of the ethnographic component of the multimethod evaluation of the Head Start Bilingual Bicultural Curriculum Development Project. Adjustments made as a result of feedback are indicated. The document is organized into several sections. First, a brief review of the evaluation objectives is presented, followed by a summary of the evaluation approach developed by Juarez and Associates to achieve the objectives. The report continues with a discussion of the development of observational instruments to be used in the evaluation. A description of the recruitment and selection of the staff who will use the data collection instruments, and of the various components of the training of the field personnel, is then presented in detail. The report concludes with a series of recommendations for the remainder of the ethnographic component of the project. Several related sets of materials, such as a timeline, job descriptions, socioemotional rating scales and a list of training personnel are appended.
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An Evaluation of the Head Start Bilingual Bicultural Curriculum Development Project

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Report of the Pilot Study Results and the Training of Fieldworkers for the Ethnographic/Observational Component

Authors: Ray Chesterfield, Jose Gonçalves
Pat Gándara, Harold Levine, Tom Weisner

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September 28, 1979

Contract No: HEW 105-77-1048

Project Director: Luis C. Moll, Ph.D.
Co-Project Director: Ray S. Pérez, Ph.D.

Prepared for Dr. Steve Martinez, Project Officer
Administration for Children, Youth,
and Families
Office of Human Development Services
Department of Health, Education, and
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1. Introduction

This report is submitted to fulfill the requirements of Tasks VI and VII of Amendment I to HEW Contract No. 105-77-1048. Its primary purpose is to provide information to the Administration for Children, Youth, and Families on feedback from a consultant panel on the initial phase of the observational ethnographic component of the evaluation of the Head Start Bilingual Bicultural Curriculum Development Project and to demonstrate the adjustments made in the preliminary report as a result of such feedback. The emphases of the report remain the development of instruments, the training of personnel required to explore the competencies and abilities of children in naturally occurring classroom contexts, and Juárez and Associates' multimeasure approach to the evaluation of a program's process and outcome behaviors. In general terms, the multimeasure approach stresses the importance of using parental and teacher input, examining the process of implementation, and observing young children's behaviors in context over time and from multiple perspectives in order to avoid sole reliance on pre- and posttesting to assess the effects of the four Head Start curriculum models being evaluated.

In addition to further developing and operationalizing the strategy of complementing an experimental psychometric approach with multi-method observation data collection, this report describes alterations made in the originally proposed procedures and scope of work for the observational component as a result of funding delays and other unforeseen circumstances.

As originally proposed, recruitment of eight participant researchers, a data manager, and a coordinator/supervisor of participant re-

searchers was to begin in February 1979, with selection occurring between April and June 1979. Training was to commence in June and last from six to eight weeks. Similarly, instrument development and piloting were to take place over a five-month period with a final piloting being carried out by the participant researchers at each field site in August 1979. Such procedures would have ensured the calibration of instruments to the specific characteristics of each Head Start model and site as well as allowing for a detailed indexing system for ethnographic notes.

Suggestions by ACYF staff members and the advisory panel as well as lengthy funding delays led to a reduction in the number of participant researchers and alterations in their scope of work. As funding for the ethnographic component was not approved until early July, severe constraints were placed on both the development of instruments and the training of personnel. The impact of the restricted time span on instrument development, recruitment, and training is discussed individually for each of the topics falling under those general headings. In addition, the overall strategy of Juárez and Associates for dealing with time constraints and the procedures and recommendations to ensure the quality of the data are discussed in appropriate sections of the report.

This document is organized into several sections. First, a brief review of the evaluation objectives is presented, followed by a summary of the evaluation approach developed by Juárez and Associates to achieve these objectives. The report continues with a discussion of the development of observational instruments to be used in the evaluation. After this, a description of the recruitment and selection of the staff who will use these data collection instruments,

and of the various components of the training of the field personnel, is presented in detail. The report concludes with a series of recommendations for the remainder of the ethnographic component of the project.

A. Review of Contractual Responsibilities

This section outlines the contractual obligations of Juárez and Associates and describes the role of the ethnographic component of the evaluation in meeting such responsibilities. In addition, a summary of the design of the study and the multimethod approach to data collection is presented.

The work statement in the evaluation contract with Juárez and Associates specifies that the purpose of the evaluation is to assess the effectiveness of four early childhood bilingual bicultural curriculum models for Spanish speaking children. More specifically, the contract requires the evaluators to collect information on the following:

1. The feasibility of successfully implementing the models in more than one setting. That is, the evaluators must secure information which will assist others in learning about the potential of a model for implementation elsewhere. This activity requires the evaluators to collect information regarding both the process necessary to implement each model and the procedures needed to maintain each model in a new environment, including descriptions of any special characteristics of Head Start staff, students, parents, resources, and/or community needed to assure success in its implementation.

2. The extent to which the models, once implemented, are meeting their objectives. This means that one emphasis of this evaluation is on measuring the change in children, teachers, and parents as a result of their participation in the four curriculum models. In this regard the contract specifies an experimental pre- and posttest design. Children were to be assigned randomly to treatment and control (no-treatment) groups. At the beginning and conclusion of the treatment, they are to be tested on selected competency measures (see Juárez and Associates, July 1978). This testing includes the following domains: Spanish language comprehension, Spanish language production, English language comprehension, English language production, and concept development.

A questionnaire will be administered to parents which is intended to assess background characteristics, attitudes, and knowledge with regard to education in general and bilingual education in particular, and attitudes toward educational and vocational careers for their children. Head Start teachers complete a questionnaire designed to assess their backgrounds, their understanding of the terms "bilingual" and "bicultural" in the context of an early childhood program, their attitudes toward children, their sensitivity to special ethnic and linguistic characteristics of children, and their ability to use these characteristics in a positive fashion in the instructional program.

3. The extent to which the models are greeted favorably by Head Start staff and parents and by community members.

This means collecting information regarding staff members' satisfaction with their participation in implementing each model; parents' attitudes on whether the particular model reflects their interests for their children and their children's needs; staff opinions as to the degree of clarity of the curriculum package and the training modules, the practicality of the curriculum contents, lesson plans, etc.; and the ability of the models to take into account the specific needs of their programs and the characteristics of the environment in which their programs are located.

Finally to be developed is a set of pamphlets which summarize all the data that have been collected during the course of the evaluation. The purpose of the pamphlets is to aid in the dissemination of information about the four models to interested Head Start programs. Therefore the pamphlets will include descriptions of the models, implementation information, assessment of the specific strengths of each model, and information regarding the impact of each model on parents, children, and teachers.

B. Summary of Design and Methodology

As stated previously, the evaluation contract specifies the use of an experimental pre- and posttest design. Ninety children at each of the eight replication sites (two for each bilingual bicultural curriculum model) were to be assigned randomly to treatment and control (no-treatment) groups. At the beginning of the treatment in September 1979 and at its conclusion (late May 1980) the children are tested on selected competency measures (see Juárez and Associates, July 1978). Similarly, at both the beginning and the completion of

the Head Start year, parents are to be administered questionnaires which assess background characteristics, attitudes, and knowledge with regard to education in general and bilingual education in particular, and attitudes toward educational and vocational careers for their children. At the time of the pre- and posttests Head Start teachers will also complete a questionnaire designed to assess their backgrounds, their understanding of the terms "bilingual" and "bicultural" in the context of an early childhood program, their attitudes toward children, sensitivity to children's special characteristics, and so on.

As contracted, Juárez and Associates has attempted to implement an experimental evaluation design at each of the replication sites. However, certain sites have been unable to meet their contractual obligations of supplying the names of ninety children for random assignment. Consequently, random assignment of subjects will not be possible at five sites, and comparison groups instead of true control groups have been selected at these sites. These alterations in the original design increase the importance of the integrated approach to evaluation discussed here.

The evaluation approach developed by Juárez and Associates integrates both qualitative and quantitative methodologies as complementary data-collection strategies. In order to facilitate the integration of both methodologies, a time series approach to data collection has been adopted. This arrangement permits the administration of pre- and posttests, as well as periodic and ongoing school, classroom, and community observations for preselected time periods (see Appendix 1 for approximate dates).

To carry out such a multimethod, contextual strategy Juárez and

Associates has carefully trained and will place at each evaluation site a test supervisor to train local testers and to oversee the collection of the test data, an interview supervisor to be responsible for training local interviewers and supervising the collection of parent interview data, and the subjects of this report, participant researchers and implementation researchers to collect ethnographic and other observational data.

At four sites (South Bronx, New York; Corpus Christi, Texas; Rio Grande City, Texas; and East Los Angeles, California) a full-time participant researcher (PR) will be present for the entire year. These individuals will gather data by means of ethnographic notes, time and event samples, implementation forms, and phone-call updates. Of principal concern will be the day-to-day implementation of particular curriculum models and behaviors in naturally occurring classroom contexts. In addition to such general observations the participant researchers will collect specific information as to the implementation of the model and the classroom behaviors of a sample of approximately 15 children per site at preselected periods throughout the year. (See Appendix 1 for approximate dates.) Similarly, four implementation researchers will each collect information on the implementation of a model and engage in general classroom observations at specified times during the year at the one other site where a particular model is being used. The data collected by all fieldworkers while in the field will be sent weekly to the Juárez and Associates offices in Los Angeles, where it will be monitored by the supervisor/coordinator of participant researchers and coded and indexed by the data manager.

The PRs will provide reliable data to complement the validity of the quantitative data collected during the pre- and posttests. The relevant reliability comparison to the classroom observational data is not formal tests or one-shot field visit observations; the context-specific, long-term, quantitative/qualitative mix of data the PR will collect trades validity and multiple measures for the formal reliability of tests. Acceptable reliability is attainable in these measures, but constant vigilance and planning are required.

There are several reasons why Juárez and Associates advocates a fieldworker role. It is our position that too many evaluations utilize only outsiders who come into the classroom to administer tests or questionnaires or to interview and who then leave the classroom. A common complaint is that this type of evaluator does not ask questions relevant to the programs or the sites and fails to obtain a fair sample of the typical life within the school. Such an evaluator cannot really learn in the short time available what is going on and cannot know nearly as much about the system as the insiders who run the school.

A participant researcher is both an insider and an outsider; his/her role helps to overcome this structural problem of differentiating between the role of "outsider" evaluator and "insider" staff member. His/her participation can provide revealing contextual and relevant data at each site. Thus, the PRs have an important and difficult role. For selected periods of time they are simultaneously involved in the day-to-day activities of each Head Start center and gather inside data (on teacher activities in the classroom, how parents and children react on a day-to-day basis, etc.). But PRs are also responsible for interviewing teachers and for contacting a

sample of homes to gather ongoing information on educationally relevant activities.

A primary contribution of the ethnographic component will be in the assessment of the nature and extent of program implementation over time. Checklists, frequency counts, rating scales, and informal interviews will provide data on actual behavior in classrooms: what teachers do, classroom arrangements, allocation of people, materials available, and so on, which can be used to assess the congruence between proposed programs and the models as actually implemented. In addition, both the implementation forms and the ethnographic notes taken in classrooms will be used to identify constraints and obstacles to the implementation of any given model at a particular site.

Observations of classroom activities and situations, such as specific lessons and language use in various situations, will be taken into consideration in the interpretation of test data. These observations will also include information on the measurement process (or how the children in both the treatment and the control groups were tested) and on the experimental arrangement, including information on the control group experience and how well randomization worked. All of the information from the above data collection activities may be used in analyzing test results.

Focusing on model-relevant child behaviors, observational data will be systematically collected during the evaluation year. This procedure will provide a complementary and alternative way of examining the program's impact on parents, teachers, and children. It will enable the observation of program effects both on domains specified by the model developers as well as on behaviors not anticipated by model developers. It will also provide a methodologically independent

cross-validation of the quantitative test results (Campbell,
1974).

II. Instrument Development

This section discusses the development of the variety of instruments and procedures to be used during the ethnographic/observational data collection. Those instruments and procedures to be used during the initial phase of data collection are discussed first. Included are a description of the instrument or procedure, a discussion of its development and/or piloting, and an explanation of adjustments made to cope with constraints on original procedures. Instruments remaining in prototypical form and their proposed development are then dealt with, while the final part of the section is reserved for a discussion of data filing and quality control.

The time constraints created by delays in funding for the ethnographic component of the evaluation have also impacted on the development and piloting of all instruments. It was originally envisioned that piloting the observational instruments would be divided into two phases. The first phase was to consist of a pilot at local Head Start centers in Los Angeles. This initial debugging was to have focused on the practicality of the methods, the techniques for establishing and maintaining reliability, and the amount of training and the practice needed to effectively collect data and to establish a routine use of the instruments and methods. Phase two was to be a second tryout by the participant researchers at their actual field sites. Emphasis was to be placed on establishing reliability, on accuracy in reporting results, and on establishing rapport. These objectives were to be accomplished by providing a number of practice sessions over a two-month period for the people

who would be using the instruments in the field. Given the short span of time (approximately three weeks) between approval of the ethnographic component and the beginning of training, along with the fact that no local Head Start centers were open in July and August, it was necessary to restructure the piloting procedures.

The impossibility of finding preschools operating during the summer equivalent to those to be evaluated led to the use of a variety of different types of preschools in the West Los Angeles area. The reduced length of time forced the placement of particular emphasis on the methods and procedures for assessing program implementation and on the development of categories to be used in the focused ethnographic observations. Development and piloting became a three-phase endeavor composed of (1) creation of prototype instruments and some initial piloting at local non-equivalent preschools by Juárez and Associates staff members, (2) piloting of the instruments in the same local preschools by the participant researchers, and (3) refinement and modification of the instrument by the fieldworkers on site prior to the first implementation data collection point. The particular strategies and procedures followed with each of the instruments are discussed below.

A. Implementation Forms

The goals of the evaluation segment concerned with program implementation are to provide information to (1) parents, teachers, and administrators who have an interest in initiating a Head Start program used on one or more of the models, and (2) individuals who

are concerned with the impact of the models on children, parents, and teachers and who seek to learn the extent to which a model was actually put into operation relative to the way it was described by the model developers. The implementation evaluation conducted by Juárez and Associates is, however, not intended to substitute for any implementation assessments carried out by the curriculum model developers. Instead, the Juárez and Associates evaluation is intended to provide the basis for the preparation of pamphlets describing the model programs as well as to contribute to a better understanding of the impact of the individual and combined programs on parents, teachers, and children.

Implementation is an ongoing process requiring an assessment strategy that parallels the program activities and continues throughout the entire experimental period. The implementation evaluation will provide information to others regarding both the processes necessary to implement each model and the procedures needed to maintain each model in operation. Such knowledge should help others in planning for this implementation of one of the models in a new environment. Included in the results will be a description of any special types of personnel or types of participation by parents, students, or community that are needed to create a greater probability of success in the implementation of the model. In accord with the evaluation contract, the extent to which a model has been implemented will be taken into consideration in the interpretation of impact data.

In evaluating the nature and extent to which each of the curriculum models is implemented, there are five proposed categories of information to be collected. These include (1) the

setting and material resources available; (2) the individuals involved; (3) the schedule and organization of the programs; (4) the attitudes of the individuals involved; and (5) the activities in which the individuals are engaged. These five categories of information were chosen through a review of the programs and objectives of each of the curriculum models as well as a review of each model's plan for assessing its own implementation. This pool of inductively generated items was then combined with variables identified in other evaluation studies. The combined list of variables was reduced and organized thematically into the five categories mentioned above. The principal concern throughout was to make sure that the items included would be relevant to the models while enabling Juárez and Associates to be responsive to its own ACYF contract objectives. The five categories of information to be collected and their relationship to evaluation goals are detailed below.

The Setting and Material Resources. This category concerns the relationship between the physical environment, including equipment and supplies, and the program needs and goals. The program models vary in their approach to this category with, for example, one seeking considerable open space and another seeking more structured space. Whatever the need, however, it is assumed that the availability of an appropriately equipped and supplied site will affect the nature and extent to which a program can be implemented. It is further assumed that this site suitability will influence the interpretation of the program's impact and the decision of other interested persons as to the transferability of the program to other locales.

Individuals. Here the concern is with all of the individuals--ACYF representatives, curriculum model developers, administrators, teachers, aides, parents, and community resources--who will be involved in implementing the program at a given site. It is important that certain demographic data relative to these individuals as well as their participation in the program be documented. Furthermore, it will be necessary to know whether the children and their assignment reflect the criteria as established for the implementation of the models. This information will be of special use in interpreting the impact data and informing others of the individuals needed to ensure a successful program.

Schedule and Organization of the Programs. This third category of information documents the extent to which planning is evident in the program, the nature of the record-keeping that occurs in the center, the decision-making and the decision-making structure, the grouping of children and adults, communication channels, and so on. In each case, the interest is in how the program is structured and organized to achieve the stated goals. This information will be especially important to other individuals who seek to learn about how to initiate a similar program in their own locale.

Attitudes. To some extent the support of the administrators, teachers, aides, parents, and the community at large will be needed to ensure a successful program implementation. A few appropriately placed individuals who are outspoken in their negative or positive appraisal of a program may well alter the outcomes. This category of information seeks to identify attitudes of this sort as well as the expectations and explanations held about the program, inter-

personal relationships, and the history of the center as it impacts on the present effort. This information will assist in interpreting the impact data, especially in those instances where conflict or negative appraisals predominate.

Activities. The final category of information related to implementation concerns the activities, or what happens in the centers. Here it will be possible to test the relationship between what teachers, children, and parents actually do and what the curriculum developers hoped they would do. Likewise, information as to typical routines, the emphasis placed on language, cognition, and culture, and so on, will be acquired. These data will provide some insight as to the relationships between activity and learning or activity and outcomes as well as information about what actually occurs in a setting where a particular model is implemented.

The implementation instrument developed by Juárez and Associates includes model-specific checklists, frequency counts, and scales for rating classroom events as well as informal interviews with teachers, aides, and parents.

The first step in the development of this instrument was the independent review of each curriculum model by two Juárez and Associates staff members who are specialists in early childhood education and by an expert consultant in the same area. Each individual categorized salient features of each model under the five implementation categories. From such lists an initial checklist was generated for each model. When these checklists were reviewed by Juárez and Associates staff members, it became apparent that while

such a checklist format was appropriate for ecological classroom characteristics such as setting and materials, it would be impossible to establish readily observable criteria for many specific dimensions of a model listed under the other four implementation areas. Thus, using the content from the original list, a multi-measure strategy for observing implementation at each site was created.

First, all recent curriculum materials were again carefully reviewed to ensure that the information used was up to date. Next, those items which could be observed were organized into a checklist format. As can be seen from the example of the instrument presented in Appendix 2, the checklist begins in Part A with a listing of the planned and intended classroom organization for the day. The goal of this part of the observation is to record what is actually planned for the day and what materials and activities are available. Upon arrival at a site the fieldworker should find the posted schedule of events or talk briefly with teachers or staff concerning the intended norm or plan for the morning. Once the actual schedule to be followed that day is known, the observations in the other sections should be made three times during the school day. The first notation should take place after the initial arrival/organization period with the following periods being chosen to optimize the opportunity to observe model implementation.

The purpose of Part B is to count, by means of a visual sweep of the room, elements of the model identified in the curriculum as key features. To do this the fieldworker reviews the schedule or consults with the teacher and selects three periods when clear, intensive teaching or educational activities as defined by the model are taking place. The selection of the three periods should give the model its best chance of being observed in action, that is, when the teacher, aides, and parents or volunteers are most likely to be doing the things which the model documents state should be going on if the model is being successfully implemented. As mentioned earlier, the instruments must be further refined and calibrated on site. Thus one of the participant researchers' tasks during the early days will be to add items to the list of key aspects of the model at the site and to furnish site-specific definitions for specific items. Such modifications either in the format or content of the Part B or other parts of the implementation instrument will be reported to the coordinator/supervisor of participant researchers, who will incorporate such information into the model-specific instruments and standardize those of each model for the first implementation data collection point in October.

Part C is an overall assessment using the classroom as the unit of analysis. Ratings are made of the frequency, intensity, amount of time, or number of things reflective of a particular model which took place in the total time period during which a fieldworker was observing a class. Sampling strategy for making such judgments will incorporate both the information gathered in doing the first implementation forms and from a specific sampling and note-taking plan.

most appropriate for a site. The sampling strategy might use time samples, spot observations, systematic positioning, or examination of key events. All these strategies were simulated, practiced, and discussed at some length during the training period (see section IV). No single strategy can be specified in advance for specific rules of use since the sites, the models, and the daily plan and activities will vary and may require changes in fieldwork strategy.

It is the task of the fieldworker to prepare his/her strategy, discuss and clear it with Juárez and Associates, and then use it in doing the ratings. As in Part B, one of the tasks of the fieldworker is to expand on the implementation checklist, adding items where necessary to redefine the ratings provided. For example, if the distinction between large and small group activities is inappropriate and an intermediate category of group activity occurs with frequency at the site, it is the fieldworker's responsibility to add further categories and to rate these along with the categories given. If operational definitions are complex, they should be written on the implementation checklist sheet or used as the basis for expanding the items that are rated. This is particularly true for judgments of the content of different activities, group size, child attentiveness, and the quality of classroom interaction.

The final section, Part D, lists a number of model-specific topics which fieldworkers will use as guides for structuring conversations with teachers, aides, parents, and administrators. Discourse will take place during the free time of such individuals and will be allowed to vary freely around the themes. As is the case with the other sections of the instrument, fieldworkers should add categories as necessary when in the field. Overall, the implementation

instrument provides a multimethod data collection strategy that measures each of the implementation categories with varying degrees of intensity. Although an individual method may be focused on a specific category of implementation (e.g., Part D - attitudes), each form globally measures aspects of the five common cross-model categories. Hence, the multimeasure approach facilitates a cross-check on the data from form to form as well as providing in-depth data for model implementation items.

Piloting. Initial piloting of the instrument was undertaken by two Juárez and Associates staff members who were familiar with the models but untrained in the use of the instrument. As no local Head Start center was available at the time of the pilot, a bilingual preschool was used for the observations. During a two-day period the pilots made parallel observations using the implementation forms designed for each model. The percentage of agreement between the two individuals was then calculated as an indicator of ease of use of the forms. As can be seen from Table 1, relatively high interrater agreement was obtained for the first part of the instrument except in the case of the AMANECER model. Differences were primarily the result of imprecise wording related to definition of materials. Similarly, the lower percentage of agreement on Part B for Alerta appeared to result from a number of items which were difficult to measure through observation (e.g., number of mentions of home visits). Phrases in both of these parts were reformulated and there were some amplifications and changes in format in the first two sections as a result of the initial piloting. In addition, little

TABLE 1

INSTRUMENT INTERRATER AGREEMENT

<u>Part A</u>	<u>Alerta</u> (N=25)	<u>AMANECER</u> (N=26)	<u>Nuevas Fronteras</u> (N=16)	<u>Marco Abierto</u> (N=19)
Setting & Material	84% 76%	65% 58%	75% 75%	89% 84%
Schedule & Organization	(N=13) 100% 100%	(N=25) 84% 84%	(N=12) 83% 83%	(N=19) 89% -
Activities	(N=3) 100% 100%	- -	(N=4) 100% 100%	(N=7) 100% 100%
<u>Part B*</u>	67%	78%	95%	76%

*Agreement within one count.

agreement was found between the two observers in the time estimates or rank ordering required in Part C. Hence this section was subjected to extensive revision in which rating scales of the type present in the example in Appendix 2 replaced the original items.

A second pilot took place as an ongoing part of the participant researcher training. Instruments were calibrated in the field as part of the continuous simulation of field conditions. However, as the practice sites did not exhibit characteristics identical to those of any of the models, substantial alterations in the instruments were not made. Final calibration of the forms to the specific models and sites awaits the arrival of the participant researchers at their replication site. During the first month on site the fieldworkers will use the skills developed during training to operationalize definitions more precisely and to add or restructure items. The fieldworkers communicate any alterations in the forms to their coordinator at the Juárez and Associates offices in Los Angeles. The coordinator will then incorporate appropriate changes into the implementation instrument for each model and standardize the format of the instrument prior to the first collection of implementation data in October.

B. Ethnographic Notes

All fieldworkers will keep a series of notes on topics relevant to the overall functioning of the school and the implementation of each model. Ethnographic notes represent the written and properly indexed account of all on-site observations. The notes will contain

information on the school, the surrounding community, and the beliefs, values, and attitudes of those persons who have an effect on the implementation of the Head Start model, classroom behaviors, and other topical domains related to the day-to-day operation and implementation of the model program. The notes are designed to be an integral part of the evaluation effort and a separate enterprise in their own right, though they will also be used to supplement the quantitative and psychometric measures of performance.

The initial generation of fieldnote categories was accomplished by requesting that each Juárez and Associates staff member who had visited any of the Head Start sites make a list of the general categories related to school, community, or program characteristics which would be important for interpreting a model's effectiveness. Once a pool of categories had been collected, they were organized into logically related groups. These categories were field tested by the fieldworkers in the preschool training sites and amplified and indexed under the general headings listed in Table 2. In addition a series of general domain categories dealing with the central goals of each model (i.e., biculturalism, language switching, or cognitive style differences) is being developed by the participant researcher at each site and will be used by implementation researchers at the appropriate sister site during their data collection sojourns.

The notes, consisting primarily of narrative accounts but also including inventories and other written formats where appropriate, are to be written on 8-1/2" x 11" sheets of paper, individually paginated, and filed in loose-leaf binders. Duplicates of all notes will be sent to Juárez and Associates. The field supervisor there will

Table 2

MASTER LIST OF FIELD NOTES INDEX CATEGORIES

1. School-Community: Catchment Area = Geographical location from which Head Start Center can draw student population.
 - 1.1 Description of Area = Types and conditions of edifices; geographical surroundings; maps.
 - 1.2 Resources = Recreational facilities; entertainment; eating places; social and religious groups; nonformal education; marketing habits.
 - 1.3 Population Characteristics
 - 1.3.1 Ethnicity = Ethnic groups - relative size; language groups; emic identification; cross-group identification.
 - 1.3.2 Demographics = Sex; age; SES.
 - 1.3.3 Occupations = Full-time; part-time; division of labor and sex; approximate wages; number of family members employed; welfare; average income.
 - 1.3.4 Language Use = Use of English, use of Spanish out of school by 4 year olds, with whom and in what contexts; other languages; code switching, when and with whom.
 - 1.3.5 Family Structure = Average number of children; single parents; extended family; residence; interaction with grandparents and older or younger groups.
2. School-Community: Neighborhood = Ten blocks surrounding the Head Start School.
 - 2.1 (Same as 1.1 above)
 - 2.2 (" 1.2 ")

2.3 (Same as 1.3 above)

2.3.1 (Same as 1.3.1 above)

2.3.2 (" 1.3.2 ")

2.3.3 (" 1.3.3 ")

2.3.4 (" 1.3.4 ")

2.3.5 (" 1.3.5 ")

3. School

3.1 Physical Description = site location; number and types of classrooms; offices and other rooms or buildings; condition of structures; landscaping; maps.

3.2 Population = physical location in school; demographics; ethnicity; roles; language; social structure and groups.

3.3 Materials = educational/recreational usage within each classroom and availability to Head Start children in the school.

3.4 Types and Number of Activities = School administration activities; activities of school organizations; model activities related to classroom implementation.

3.5 Recruitment = Actual procedures; problems in recruitment; final division of children; attitudes toward randomization; attitudes toward evaluation and PRs.

3.6 Policy = Hiring procedures; general recruitment procedures; replacement procedures; community relations.

3.7 Budget = General disbursement of funds.

3.8 History = Background of Head Start in general; relationship with community; relationship with curriculum developers; changes from the 78-79 school year to the 79-80 school year in dealing with evaluation.

3.9 Decision-Making Structure = Involvement of director; chain of command; influence of community action groups; teachers' voice in model development.

3.10 Scheduling = Daily operating hours; yearly schedules; holidays; meetings.

4. Model

4.1 Implementation Factors = Conditions facilitating implementation.

4.1.1 Personnel = Curriculum developers; trainers; teachers; aides; parents; other staff; children.

4.1.2 Training = Duration; type; frequency; content.

4.1.3 Materials = Teaching aids; number; type; frequency of use.

4.2 Obstacles to Implementation = Natural disasters; lack of recruitment; attrition; lack of materials; lack of training; lack of money; negative attitudes by decision-makers or implementers.

4.3 Evaluations = Perception of PRs/IRs; test supervisors and other J&A staff in general; perception of ACYF by curriculum modelers, Head Start staff; parents; children.

file these duplicates, monitor researcher productivity, and check on the comparability of data sources in terms of their level of inference, style of recording, level of detail, breadth, and data indexing. The notes will be organized in one of three files: a topic-centered file, an event-centered file, and an individual index file (see section on Data Filing System). Participant researchers will (1) generate questions of interest related to the evaluation of a given model in its setting, collect observations, and write notes accordingly, and (2) focus on aspects of program implementation as specified by the respective models.

Each field note will begin with a short summary statement describing the content of the note to permit rapid review and assessment by the field supervisor or other data analyst. Whenever possible, field notes will be kept intact to maintain the full context within which specific behaviors (e.g., code-switching, language use) occur. In addition, fieldworkers will maintain a daily log of their observational activities which will be integrated with their ethnographic notes through a cross-referencing system.

C. Time and Event Samples

Time and event samples of children in the classroom are to be used by all fieldworkers to monitor behaviors in various contexts. These repeated observations of target behaviors in specific situations will provide a productive measure of what is happening within the classroom as the year progresses. The purpose of the samples are twofold: (1) to furnish a specific procedure appropriate to each

model or site for rating classroom behaviors related to implementation and (2) to collect behavioral samples (e.g., descriptive language use) which are context specific and relevant to the programs' objectives. Although both groups of fieldworkers were trained in the use of time and event samples, it is likely that the monitoring of individual children required by the second objective will be undertaken only by participant researchers with a subsample of children. However, at the completion of training and placement on site of the fieldworkers, all of the sites had not complied with their contractual obligation to recruit 90 children four years of age with no previous preschool experience, and at least 50 percent of whom were Spanish dominant. Consequently, the selection of the subsample has not as yet been made. Hence, although fieldworkers were given exposure to a variety of sampling techniques during training, record sheets for recording data under specific domains remain largely prototypical.

During the fieldworkers' training, sampling of language usage was carried out in a variety of ways. One of the sampling strategies involved the selection of target children for observation at specific time intervals of 5-10 minutes. The participant researchers carried out this observation by looking at a watch or clock, recording the time the observation began, taking notes on specific children's language use for the time intervals allocated, and recording the end of the observation period. These "rough notes" were later transcribed into final notes. This is a complex system of data collection which focuses on some children and may not always be appropriate for observation of group activities. There are situations, however, like dyadic interactions of child/child, adult/

child, etc., in which this focused observation strategy may be particularly useful.

A more simplified strategy of sampling was also employed to observe language usage during the course of a specific event. With this strategy, the researchers selected ongoing events such as story telling and recorded the language interaction taking place between the teacher and the group of children in specific contexts. During the course of these events, lasting from 15-20 minutes, it was observed that language usage was particularly intensive. Due to the nature of these interactions between teachers and children, it was easy to record children's language usage as well as teachers' efforts in correcting and inducing more complex language development in children. This strategy allowed the participant researchers and implementation researchers the flexibility to sample both socio-emotional aspects and language for the whole group as well as focusing on dyadic interactions of interest during the particular event being observed. For example, each time the children talked about feelings, self, others, etc., the participant researchers recorded the content as well as the language used.

From the above sampling strategies used on sites piloted during participant researcher training, sample recording sheets such as that in Table 3 were generated. Table 3 shows a sampling sheet devised for recording socioemotional and language usage data. The sheet is divided into two columns, the event column and the code column. The event column simply lists a series of specific behaviors related to language use. These are further described under categories of conversation, fantasy/meaning/pictures, complexity, and switching, referring to general components of language usage being measured. The

code column, on the other hand, gives some examples of how an event sample would be coded. For example, if Maria describes something in Spanish about the class to José (teacher) during free play time outside, this would be coded as the example in Table 3 (Maria-S-T₁-2/⁴; see the notes accompanying Table 3 for more details). The purpose of this strategy of recording event samples is to emphasize the language use data collected for each child or teacher, taking into account a variety of different contexts and types of language usage and so on. It should however be noted here that this sampling instrument was devised and piloted under conditions with little or no bilingualism, and that it is therefore still subject to further revision as a result of experiences gained during its implementation at the actual Head Start sites.

As can be seen, the sample recording sheet is designed to record frequency counts of language-related variables which occur in a given context. The collection of sample data on a periodic basis such as two to three times a week and repeated across children and across contexts at specific periods for the entire year can provide a comparative measure of Spanish-English usage by teachers and children as well as of the content of activity. The advantage of a frequency measure is particularly evident in indicating changes and increases or decreases in language-related behavior over time. Also the stability of the measures and their validity will be enhanced, since no child or context will be judged using only one or two visits. This comprehensive approach of data collection through repeated observations of the classroom throughout the year will provide detailed information on implementation of curriculum as well as elucidating the process of classroom dynamics for the entire year.

Table 3

Event Sample Recording Sheet for
Language Usage of Children¹

<u>Events</u> ²	<u>Code</u> ³ (Examples)
<u>Description</u>	
Describes common objects	
Describes class events	Maria.-S-T ₁ 2/ ⁴
Talks about self	
Talks about others	
Talks about feelings	
<u>Conversation</u>	
Gives instructions	Janis-E-Luis 4/ ⁵
Tells a story or event	
<u>Fantasy/Meanings/Pictures</u>	
Jokes, laughs over stories, pictures	
Matches words with pictures for child	
<u>Complexity</u>	
Produces complete sentence - simple	
" " - compound	
" " - complex	
<u>Switching and Mixing</u>	
Mixes both Spanish and English words in sentence	Tom-M-Ray 1/ ⁶
Switches Spanish and English phrases in sentence	
Answers in Spanish or English when addressed in Spanish or English	

Notes for Table 3

1. Completed by participant researcher in classroom settings at standardized periods during the morning, focused on specific events, teachers, or children in a timed sequence.
2. Events will vary by domains in contract and by key events in each model's implementation list. This sample list includes several different components for one domain (Spanish/English language production) and some overlap in content for illustration.
3. Each event for a focused observation of a child or teacher is coded using a simple mnemonic device such as the following.
4. María (target child) describes a class event to José (teacher: T) in Spanish during free play time outside.
5. Janis (target child) gives instructions to Luís (other child) in English during an object manipulation class activity.
6. Tom (target child) talks in mixed English and Spanish to Ray (other child) using complete sentence.

Codes for Table 3

Language Code: S-Spanish
E-English
M-Mixed

Teacher Code: (T₁, T₂, T₃ ...)

Aide Code: (A₁, A₂, A₃ ...)

Parent Code: (Last names Mo/Fa) (ex. Gómez Fa)

Child Code: (names)

Context Code: 1. story-telling time
2. free play outside
3. free play inside
4. object manipulation activity
5. word/picture/number
6. other

Although designed to collect teacher and/or child language data, these records could also be used to assess implementation of particular curriculum models. If, for instance, a model specifies that during a classroom activity time teachers should use a mixture of Spanish and English and encourage children to do the same, data collected according to these event sampling strategies could yield information on the implementation of the particular model under observation.

D. Phone Call Updates

One of the primary goals of the supplementary ethnographic data collection contract was to provide greater continuity in our information on both the control group and the school children in the Head Start sites. Originally it was planned to do home observations on samples of both Head Start and control group children in order to provide continuity in our longitudinal data collection effort over the year, and to provide data on the contexts and potential generalization of Head Start behaviors to the home. This plan was abandoned owing to financial and logistical pressures and a system of phone call updates to obtain background demographic information was substituted.

The phone call update is a method devised for following up home activities of the control group children as well as the treatment children (those in the Head Start programs). Its main purpose is to provide supplementary ethnographic data away from the research sites. A short and relatively inexpensive way to monitor control and experimental children, the phone call update is aimed at providing back-

ground information which might influence the generalization of Head Start performance to the home over the full school year. To assure the most comprehensive coverage of children under observation, parents will be contacted on a periodic basis to inquire into peer contacts, play, and other social contexts as well as other programs in which children may be participating outside of the Head Start site.

As the questions asked in the phone call follow-up are based on the parent questionnaire and the latter document is still awaiting OMB clearance, the phone call update is still at a prototype stage. It is assumed that the phone call update format will be modified to be consistent with changes and information in the parent questionnaire. It is for this reason that a finalized form of the phone call update has not yet been developed. Thus, what follows is a basic guideline for the procedures to be followed once the parent questionnaire is authorized and received by Juárez and Associates.

When phone contact is made with the parent (who will usually be the mother or the person who completed the original parent questionnaire), the telephoner will introduce and identify him/herself as was done on the parent questionnaire and will chat briefly about the child's typical days. Then, in the case of Head Start children, conversation could turn to some questions concerning the effects of the school on the child by asking about the items included in the original questionnaire such as relationships with peers, talkativeness, increased self-esteem. The phone interviewer should have a checklist of these characteristic responses and probes before him/her and simply indicate which ones are mentioned by the parents. For those not in the Head Start group (control children), questions could be asked about any alternative educational experiences the children

may have. The main characteristics of any alternative schools (size, location and address, cost, the amount of time the child attends the school, reasons for selection) would be noted. A question on the dominant languages spoken in the school should be included.

For both Head Start and control samples the interviewer might then move to a series of household and demographic questions. The phone call interviewer should have before him or her the data from the parent questionnaire. A suggested format would be "When we talked to you before, you mentioned that there were (five) people in your household at that point. How many people are in your household now?" ("Who stays there most of the time?") The phone call interviewer would then record any changes, increases, or decreases in the household and list them as on the parent questionnaire. A similar format can be used for questions on jobs, income, and employment.

The effect of this procedure may increase the likelihood of mothers responding in the same way -- that is, saying, "Yes, it's all the same as it was before." However, it is felt that this possible biasing feature is less important than the problems of doing phone call updates where the interviewer feigns ignorance, or says, "Tell me again how many people live in your household." For the most part respondents will be more likely to tell about changes than they will be to answer the same series of questions again. There is no more likelihood of bias in the response to the update questions than there would be in the original answers to the questions.

E. Socioemotional Development

Although the primary data collection associated with the children's socioemotional development will take place during the psychometric testing, the observational nature of the instruments makes their discussion appropriate here.

The original work statement written by ACYF for the bilingual Head Start evaluation included, among other objectives, the assessment of self-esteem and motivation. However, on the recommendation of Juárez and Associates, these two categories were combined to form a single conceptual entity for the purpose of evaluation. This new category was labeled "socioemotional development." Considerable evidence was offered in earlier documents to support this change. Among the most important reasons cited was the lack of sufficient independence between the constructs "motivation" and "self-esteem," since they represent a level of abstraction that is not yet occurring in the mental development of a three or four year old child.

Problems of instrumentation, however, were not resolved by re-labeling the construct "socioemotional development." Unfortunately, instruments which attempt to assess motivation, self-esteem and hence socioemotional development in young children lack a high degree of reliability. Even the validity of such instruments is questionable with respect to usage with Spanish speaking children, since these children are rarely included in the item construction or norming phases of test development.

In sum, because of the problems associated with the definition of the construct in such young children, and because of the absence of adequate instrumentation to assess such a construct in a consistent manner, observation and rating scale techniques were deemed most appropriate to meet the requirements of the task. Also, since the evaluation plan was multi-faceted and would incorporate ethnographic and teacher-attitude data as well as standard psychometric data, the opportunity existed to assess socioemotional development from a number of different perspectives. Hence, it was concluded that rating scales would be used for the collection of data by examiners and teachers, and more descriptive data on children's socioemotional development would be collected within the ethnographic component of the evaluation.

Development of the Rating Scales

In order to develop a scale which would adequately and fairly assess the socioemotional behaviors considered to be important by all of the models, Juárez and Associates reviewed the curriculum objectives which were listed by each of the models. From the review, seven cross-model objectives were drawn:

- (1) sustains interest in group activity
- (2) works cooperatively with others
- (3) follows directions
- (4) shares and takes turns
- (5) evidences pride in accomplishments
- (6) sees self as capable of mastering new situations
- (7) communicates his/her capabilities to others

The teacher rating scale was developed directly from this list of objectives. However since the examiner's ratings are based upon behaviors observed in the test situation only, the examiner's rating scale required changes which would reflect behaviors which could be evidenced in this context. A set of behaviors which would be observable in a test situation and which were consistent with the socioemotional constructs tapped by the teacher's rating scale were derived. The five constructs which are tapped by the examiner's rating scale are:

Parallel Behaviors-Teacher's Scale

- | | |
|-----------------------------------|---|
| (1) persistence | sustained interest |
| (2) cooperativeness | "works cooperatively" and
"follows directions" |
| (3) waits his/her turn | "shares and takes turns" |
| (4) involvement in activity | "communicates capabilities" |
| (5) requires verbal reinforcement | "mastery" "pride of
accomplishment" |

Examples of both rating scales are presented in Appendix 3.

The combined teacher and tester ratings together with observations made by fieldworkers in the classrooms and data gained from phone call updates will provide a multiple measure of both experimental and control children's socioemotional development over time.

To establish the reliability of the socioemotional rating forms, the instruments were piloted in a local school. The pilot was designed to provide estimates of the internal consistencies of the teacher and examiner instruments, interrater reliabilities, and correlations between the two forms.

Eight children were selected for testing. During the testing the behavior of the children was monitored by at least two of six raters from Juárez and Associates. Socioemotional behaviors were then rated on a five-point scale. After testing, teachers familiar with the behaviors (via classroom interactions) were asked to rate four of these children on seven items believed to measure socioemotional development. Table 4 below shows the results of the piloting.

Table 4

Results of Socioemotional Instrument Pilot

	Examiner Rating	Teacher Rating
Internal Consistency*	.96	.85
Interrater Reliability**	.83	.71

*Each group of examiners rated only some children in common. The overall reliability was computed by transforming from examiner correlations to Fischer z-scores, weighting them by the number of raters, and then averaging.

**Each item is the average score computed across all raters.

The internal consistency index measures the degree to which all items measure the same construct, in this case socioemotional behavior. Both instruments perform well in this regard. The seven-item teacher instrument exhibited a .85 reliability, while the five-item examiner form showed a .96 reliability. Given these high internal consistency indices, it is concluded that the respective five and seven item scales are adequately measuring the homogeneous construct and should remain intact.

Since subjective ratings of socioemotional behaviors are necessary, the interrater reliability of this measurement was also assessed. The resultant reliabilities were estimated at .71 between teachers and .83 between examiners. Given that neither teachers nor examiners were trained in rating protocol, reliabilities are quite good. Before pretesting, field examiners will have been given an intensive one-week training period which will serve to increase agreement. Teachers will also be provided with a debriefing on the behavioral assessment.

To answer the question of whether or not teachers and examiners are attending to the same behaviors, the correlation between the scores assigned by each group was computed. The resultant correlation was estimated to be .61. It appears that the behaviors as demonstrated in the testing situation may differ from the ones measured in the classroom setting. However, after correcting for the lack of perfect agreement with the group of examiners and teachers, the disattenuated correlation is raised to .80. With the systematic training that is to be provided, it appears that both the examiner and teacher ratings will be consistent in the measurement of socioemotional behavior.

F. Data Filing System

It is important to calibrate, validate, and obtain reliability on the data collected by the PRs in observations at the four different sites. We plan to approach this task in a number of ways, depending on the type of data, focus of interest in the topic, and cost. Interview and survey materials will be standardized. Training meetings to ensure common definitions of terms and common interview procedures have been utilized. A data filing system has been created and a number of monitoring and cross-check devices have been built into the ethnographic data collection strategies.

All participant researchers will use the same ethnographic data storage and retrieval system, which will be monitored in the Juárez and Associates offices by the field supervisor. All changes or recommendations in this system will be made or channeled by the field supervisor, who will so inform the fieldworkers. The system which has been designed is meant to be as flexible as possible, yet capable of providing specific information consonant with the evaluation goals contracted for by Juárez and Associates.

The data storage and retrieval system is comprised of two key elements: a four-dimensional format and a three-tiered indexing plan. Cross-referencing techniques shall also be employed so that data in one format* or included under one index category can be interrelated with similar data in other format sources or categories. These elements are described below.

*"Format" refers to the physical form notes will take and the particular file in which they will be placed.

Four separate note files have been planned. The first is a topic-centered file in which notes related to certain domains of interest to program evaluators will be kept. The topics will be given category labels and category numbers, and all material on a given topic (at a given field site) will be placed together and dated with day of observation and day of actual write-up. Additional pages will be added to each category number as information accumulates over the year. The second file is an event-centered file in which descriptions of particular behavioral episodes (e.g., PTA meetings, school parties, classroom activity periods) will be written up in full. These accounts will be similarly dated and identified by fieldworker, but entered into a separate binder with separate pagination. The same indexing system used in the topic-centered file will be used to classify these notes, but category numbers will be entered in the margins of the notes and then separately indexed. The third file is designed to assemble attitudinal data offered by individuals (through direct interviewing) whose role in the school or Head Start program importantly impacts on model implementation. Though it cannot be known at this time who these individuals will be, they will almost certainly include selected teachers, administrators, community persons, and students. A cover sheet with a code number for each individual will be constructed to provide space for general background information including age, ethnicity, language use and the like. Supplemental pages will be added, dated, and separately paginated as necessary. As with the event-centered file, additional categories of information contained in these notes will be marked

by a code number in the margin and indexed. In addition, each individual will be given a file number, and attitudinal material collected from them but located in other note sources will be indexed on a separate sheet attached to the cover sheet in the individual file. Finally, researchers will keep a daily log detailing their research-related activities and where (i.e., in which file) their notes on these activities are to be located.

An indexing system is a mechanism for defining categories of relevant information, organizing them in a uniform manner, and pairing these categories (or their code numbers) with actual written data. Any indexing scheme is necessarily an arbitrary one, as there are an infinite number of ways to divide behavioral phenomena. The key elements, therefore, in designing such a scheme are (1) to decide on what kinds of information are desired and how they are to be used, (2) to label and operationally define the categories of information, and (3) to use the resultant system consistently. In terms of the types of information needed, apart from specific content issues, there are two basic goals for the use of an index system. The first is to provide a descriptive catalogue in which as many categories of information as possible are separately identified for later retrieval. The second is to produce an analytical file in which broad-based descriptive goals are abandoned in favor of focused categories which stem from specific evaluation goals or questions or preliminary decisions about significant relationships in types of data. A descriptive system offers comprehensiveness and an analytic system provides focus. The Juárez and Associates system will be a combination of both category types.

Beyond the question of types of information desired is the question of the basis on which the index system is to be constructed. Here again there are two basic strategies. The first is to use an "etic" approach, by which is meant a series of pre-formulated categories derived on both theoretical and model-specific grounds, but applicable to all sites. The second is to employ an "emic" approach, in which each participant researcher develops categories on the basis of his/her informants' usages and ways of perceiving the world, and which may therefore be "site specific."

The strategy is to use a combined etic-emic approach. The result is a three-tiered index category system. In the first tier we have constructed four superordinate category codes and a series of subordinate ones (see Table 2, p. 29). These categories will serve to organize basic descriptive information on both the school and community setting, major activities, school and classroom organization, and on the individuals who participate in these settings. The second tier of categories, currently being developed, are also etic categories; but ones which result from topics of concern to each of the four Head Start models being evaluated by Juárez and Associates. The third tier includes emic categories generated by each fieldworker and reflective of local concerns and program implementation issues.

A complete list of categories, their code numbers and hierarchical arrangement, and a full narrative description of the information to be included under each category heading will be supplied to each participant researcher. As new categories are generated they will be added to the list by the field supervisor and disseminated to all researchers through supplemental sheets.

Our data indexing and retrieval system is an adjunct to data analysis, not a substitute for it. As a result we have tried to design this system to be both comprehensive and flexible. As with all such systems, actual field use will determine its workability and will suggest any changes that may need to be made.

G. Quality Control

Juárez and Associates has planned a series of activities to systematically monitor observational data gathering and to ensure the accuracy of the information collected. These activities which will be discussed below include the following: the experience and training of the fieldworkers; the hiring of an experienced bilingual educational anthropologist to supervise and coordinate the field operations and conduct parallel observations; the establishment of procedures for constant monitoring of field reports, including weekly feedback to the fieldworkers and reorientation and retraining meetings; the establishment of a central processing center to facilitate consistency of data reduction, synthesis, and interpretation; the development of standardized formats for accurate data recording; and the development of a field manual to provide common definitions, delineate role relationships, and specify ethical and confidentiality considerations.

Field Personnel. It must be pointed out that the quality of the field operations and the validity of the data obtained are primarily a function of the competence of the fieldworkers recruited. As pointed out earlier, all of the field staff recruited are fluent bilinguals, have observational data collection experience, and have

received relevant graduate training. Additionally, their performance during the rigorous training sessions was impressive. In these sessions the fieldworkers demonstrated to the satisfaction of the evaluation staff and the consultant experts a high degree of skill in observation and reporting tasks and an excellent understanding of the research issues related to the use of multiple methodologies. Furthermore, they showed professional competence in dealing with issues of reactivity and cooption by having teachers and other staff members make judgments about their effects at the training sites. Such a practice when continued at the actual field sites will allow the coordinator of fieldworkers to measure to some degree the amounts of reactivity and cooption which will be occurring.

Coordinator of Fieldworkers. Juárez and Associates is aware of the difficulties involved in managing participant researchers in the field and collecting information of acceptable quality and accuracy. For this reason, an experienced educational anthropologist has been hired as a full-time coordinator/supervisor of the fieldwork related aspects of the evaluation and data collection efforts. Although this person will be based in Los Angeles, he will spend time in the field coordinating the data collection efforts at the various Head Start sites. The purpose of these field survey visits is to handle definitional and measurement problems and to do parallel observations for data accuracy checks. These parallel observations which will occur at least twice during the year between each fieldworker and the coordinator will serve to verify the weekly field reports, to recalibrate or redirect the fieldworkers' observations

if necessary, thereby controlling for possible drift, and to identify any observational stimuli that might have been overlooked by the fieldworkers.

Weekly phone call checks will be made with the participant researchers to monitor progress and provide feedback. The content of these calls will include the quality of the fieldnotes (legibility, format, consistency, level of inference, etc.), the quantity of information being sent, the thoroughness of the data, and information on index numbers for new data or categories of data.

The coordinator's role is a critical one in assuring the success of the fieldwork strategy. There are obvious difficulties related to timing and local needs that will have to be weighed constantly. There will no doubt be some changes in the PR's role during the period of evaluation, and there will need to be consultations and scheduling of the various data collection efforts. The coordinator will be responsible for setting deadlines for and directly supervising the fieldworkers, for monitoring the accuracy of field observations and other data collections done by the PRs and IRs, and for ensuring that the timing of data collection efforts meets the needs of each model site and that the roles of the PRs are appropriate to their settings. The coordinator will also be making calls to the field himself to spot-check telephone interviews and other contacts with the families and the schools for comparison and reliability purposes.

Mid-Year and Final Reviews. In addition to the individual procedures carried out by the coordinator to ensure data accuracy, re-orientation and training will occur twice during the year. These meetings will be designed to recalibrate observations and minimize

observational drift,* which might occur over time as well as provide a respite for participant researchers from their constant data collection activities. In December and again in June all of the fieldworkers will assemble in Los Angeles. At this time each will write brief summaries of his/her overall assessments up to that point. This review will help in focusing and providing a synthesis and summary of the notes which have been collected. At the end of the school year when the researchers again assemble at Juárez and Associates' Los Angeles offices, these reviews and summaries will be done as part of the final reports required of the participant researchers. This will provide Juárez and Associates with a clear set of summarized qualitative notes assessing the key areas of implementation, classroom impact, and learning, and outlining the control group tracking which will have been undertaken throughout the entire year. A further revision and collapsing of the domain and index categories will be undertaken at this time.

Central Processing. Juárez and Associates also recognizes the importance of processing the information after it arrives from the various curriculum sites. Just as consistency and accuracy are necessary in the collection of data in the field, similar considerations are essential in their eventual processing. This processing includes editing, categorizing, information reduction, and storage.

*Observer drift as defined by Hollenbeck (1978: 84) is the systematic change in the observer's coding and classification of various behaviors over time.

To minimize any inconsistencies in this effort, a special data flow procedure has been developed. Whereas there are now eight fieldworkers, only one position, that of data manager, has been created to process the information. To ensure accuracy and thoroughness in carrying out these tasks, the data manager is also under the supervision of the coordinator of fieldworkers. By working together, these two individuals through their expertise combine a broad perspective on field activities with a concern for manageable data processing. This "wheel-hub" effect will serve to eliminate any unwanted variation in in-house interpretation. Consistency in the feedback process mentioned above is also assured, since it will emanate from the one focal position. Cross-model reliability of observational notes can also be monitored more accurately under this method.

It is tentatively planned that participant researchers will undertake the midpoint implementation data collections in the sister site to the one in which they are permanently stationed. The multiple observation of a single site will provide an estimate of reliability as well as furnishing an additional check on consistency by serving to identify the effect of socialization into a particular Head Start site and community.

Formats for Data Recording. The initial interrater agreements obtained on the implementation forms and socioemotional rating forms give an indication of the consistency of those instruments. Calibration and refinement of the implementation forms at the actual field sites and subsequent within-model standardization by the coordinator prior to data collection should enhance further consistency. Items on the forms will be coded and used to provide

a quantitative baseline measure for assessing the degree of implementation as well as a complement to and check on other implementation data. However, the best insurance of consistency appears to be the continuous monitoring of observers under covert assessment conditions which have been created. The flexibility of the ethnographic notes and indexing system, which is broad enough to encompass cross-model objectives and specific enough to pick up the characteristics of individual models, ensures systematic adaptations to allow for changes in the nature of the information flow over time.

An additional control on the consistency of the data is the field manual being developed from the training and initial on-site observations by participant researchers. Although the field situations will vary from model to model and site to site, the manual will provide strategies and techniques to guide the investigation of events as they unfold in the field. The standardization of a set of procedures, policy issues, and baseline definitions related to specific contexts will also be included in the document, and the manual will be consulted by all field observers and the coordinator/supervisor when making parallel observations in the field.

III. Recruitment and Hiring

As mentioned earlier, Juárez and Associates had originally proposed that a full-time participant researcher (PR) or field-worker be placed in each Head Start site being evaluated. It was felt that these on-site evaluation staff members would ensure that a balanced sample of all behaviors or of the typical life within classrooms implementing the model would be collected. In this manner contextual and relevant data at each site, not usually present in pre- and posttest evaluation designs, would be integrated with data from formal testing and interviewing to contribute to a more complete understanding of each model as it was implemented at the two sites.

In the original proposal (Juárez and Associates, December 1978) PRs were also to coordinate the gathering of formal test measures, the interviewing of parents and teachers, and the contacting of a sample of homes to obtain ongoing information on educationally relevant activities. Subsequent discussions with advisory board members, consultants, and the Project Officer led to a reduction of the number of full-time fieldworkers to four (one at the site where each curriculum modeler felt that the model was being most thoroughly implemented) in an attempt to make hiring, training, and supervising more manageable. In addition at the remaining four sites, trained and experienced observers were to make quarterly visits in order to assess implementation and the general functioning of the program. It was felt that by reducing the number of participant researchers from eight to four, and by having these fieldworkers concentrate on one site per model, field management could be more effectively

controlled. This would permit increased reliability checks, closer monitoring of data quality, and frequent field and office meetings between the supervisor and the participant researchers. The overall results of the study should be strengthened by concentrating on four in-field, full-time site assessments and four implementation-only site assessments.

Recruitment

With these needs in mind and as delays in approval of funding continued into May and June (well past the original February starting date for recruitment), a letter of concern was sent to the Project Officer (see Appendix 4). In the letter it was stated that the lack of time would place serious constraints on the ability of Juárez and Associates to carry out the observational tasks as proposed. A series of adjustments in the proposed scope of work related to recruitment, training, span of data collection, and division of labor were suggested. In addition, preliminary informal recruitment efforts were begun via the telephone. Friends and colleagues of Juárez and Associates working in the areas of bilingual education, anthropology, education, and linguistics were contacted and a list was constructed of individuals who might be potential candidates for the positions or who might know of potential candidates. However, without the approval of the ethnographic component of the evaluation, it was impossible to follow up on this initial step.

The early July approval date for the amendment allowing the gathering of ethnographic data impacted severely on recruitment efforts. Given the inherent difficulties in recruiting able and

experienced bilingual fieldworkers willing to make a commitment for one year of work in the field, and the short time span of two months in which to recruit, hire, train, and place onsite participant researchers for the beginning of the Head Start school year, it was necessary to restructure the originally proposed recruitment procedures. As there was not enough time to mount a major recruitment drive, efforts were focused on organizations and geographical areas which appeared most fruitful. Job descriptions for the position of participant researcher were placed in such national outlets as the Chronicle of Higher Education and the Anthropology Newsletter, while descriptions for the positions of coordinator/supervisor of participant researchers, data manager, short-term researcher, and participant researcher were sent to a variety of university placement offices, university departments, state employment agencies, all curriculum model developers, and members of the advisory committee. However, recruitment was concentrated in areas sharing cultural and linguistic characteristics with the replication sites. Hence, special emphasis was placed on contacting the appropriate university departments, colleges, research organizations, and Hispanic scholars within a fifty-mile radius of the sites. (See Appendix 5.)

As early results of this strategy were not encouraging, additional steps were taken. Extensive telephone contact was made with experienced fieldworkers and Hispanic scholars doing research in the area of bilingual education.

Potential candidates found by these procedures as well as those persons whose names were generated by the previous informal recruitment efforts in May and June were called and asked to submit résumés if they were interested in any of the positions. The search and recruitment procedures resulted in 32 résumés for the positions of participant researcher, data manager, or coordinator/supervisor of participant researchers. These résumés were received primarily from the areas in which the Head Start sites were located, although there was a slight predominance of individuals from California. In addition, ten résumés were received for the four short-term research positions. All of these candidates were from the California area, a condition probably resulting from the nature of the task and the intermittent work schedule.

Selection

After the closing date for applications, the Juárez and Associates selection committee used a rating form developed especially for a given position (see Appendix 6 for an example) to evaluate each candidate's credentials. Each member of the selection committee independently rated all of the candidates for each position. All candidates for each position were rank ordered independently by each individual in the selection committee. Rankings were compared and the top candidates across all orderings became the short list of individuals for the position in question. Each person on the short list was then contacted by phone and subjected to a bilingual interview. Those individuals who were not fluent in both Spanish and English, who were unwilling to relocate, or who could not comply with the beginning training date were removed from consideration.

Besides making it necessary that screening of the short list of candidates be conducted by phone, the reduced time frame for selection also necessitated obtaining the references of all remaining candidates by telephone. Once references had been gathered and their content distributed among the members of the selection committee, the committee met again and selected the finalists. With the exception of one case where logistic considerations made a face-to-face interview impossible, all finalists were interviewed in person. At the conclusion of the interview, a successful candidate was offered a position, subject to final approval by the Personnel Review Committee of Juárez and Associates.

Despite the shortened recruitment and selection period lasting approximately one month, the intensive strategy relying heavily on the recommendations of experienced fieldworkers and Hispanic scholars led to the hiring of a group of highly qualified and bilingual individuals to fill the positions of data manager, coordinator/supervisor of participant researchers, participant researchers, and short-term or implementation researchers. The data manager, a Ph.D. student, is bilingual and has expertise in both qualitative and quantitative research. The coordinator/supervisor is bilingual, holds a Ph.D., and has over ten years of experience in ethnographic research among Latino communities both in the United States and abroad. All of the participant researchers have graduate training, with one holding a Ph.D. in anthropology. All have experience in ethnographic fieldwork, early childhood education, or both. The implementation researchers are all advanced graduate students with field experience in ethnographic research among children. In addition to excellent academic

and experiential backgrounds, all of the individuals were selected as persons who would be sensitive to the local circumstances where they would be working and who would interface effectively with all personnel at the replication sites.

Orientation and On-Site Placement

During their training (which is discussed in the following section) both PRs and IRs received lectures and discussions on the particular biophysical and sociocultural environments in which their Head Start site was located. In addition they met often with the Juárez and Associates staff members who were to serve as test supervisors for the collection of the psychometric data component of the evaluation and participated in the ongoing weekly phone call contacts which these test supervisors had established with key individuals at each site. In this way the fieldworkers were able to make the acquaintance of key individuals at a Head Start center who could facilitate their initial interface with the school and local environment. Additionally, a letter of introduction accompanied by the résumés of the participant and implementation researchers, the rationale for their site assignments, and the résumé of the coordinator/supervisor was sent to each curriculum modeler and Head Start center director.

IV. Training

A. Introduction

A number of features of the current training plan were set up because of the late starting date for this component of the evaluation. In the original proposal, recruitment was to begin in March and training was to begin by early June. Three months were to be allowed for training and staff development. The training time was to have included practice and pilot testing of all the forms with participation by PRs and IRs in the development of each form; visits to the field-sites for purposes of both pilot testing and familiarization with the field settings; and opportunities to visit with Head Start staff, curriculum development staff, Juárez and Associates staff, and other consultants.

As a result of the July starting date for this phase of the evaluation, it was necessary to finalize recruitment and hiring and begin training on August 6th for a period of three weeks. This three-week training period meant that substantial changes had to be made in the initial plans and that a number of different approaches to the training had to be taken. The actual training plan that emerged and was successfully implemented must be seen in the light of the extremely condensed period of approximately four weeks from the time of initial hiring and staff selection to on-site placement.

Another factor affecting training plans was that the participant researchers and the implementation research staff had to be hired and trained together. Initially it was envisioned that the

participant researchers and the implementation researchers would receive separate training with only a few common training sessions. That this was not possible in the three weeks available for the training is obvious. However, the fact that implementation researchers had to be trained with the participant research staff can be viewed as an advantage, as the result is more knowledgeable implementation researchers who may serve as participant researcher backups if necessary.

B. Personnel

The expertise of the project directors, the coordinator/supervisor of fieldworkers, and other Juárez and Associates staff members was supplemented by an extensive program for the training of naturalistic field observers developed over the past six years at UCLA (Weisner, Turner, Gallimore, and Levine, Laboratory for Naturalistic Observation; see Appendix 7 for a complete list of training personnel). This training program emphasizes most of the major problems field researchers face and offers specific techniques for the implementation of effective observational strategies for solving these problems in the field. The training staff consultants and Juárez and Associates staff alternated training participation based on their own expertise. At least two and sometimes three or four of the training staff worked with the trainees in all class sessions and discussions throughout the three-week training period.

C. Goals

Given the time constraints and goals of this component of the

Head Start contract, the training period focused on the development of a limited number of specific skills which had to be developed by September for the beginning of the Fall assessment periods. Table 5 shows the schedule for the training period. The goals for the training period included the following.

1. Ability to use the implementation forms specific to each model. This goal aimed at practice and training in the use of time and event sampling methods, rating methods, checklist procedures, and interview techniques for monitoring curriculum implementation at each site.
2. Development of note-taking skills and styles which would enable the participant researchers to use a focused index (and domain) category system for taking and keeping notes, as well as adding note categories and expanding note-taking styles as necessary in the field. For the implementation researchers, note-taking skills focused on supplements to the implementation checklist and interviewing.
3. An understanding of the professional and Juárez and Associates company rules concerning confidentiality, staff policies, and ethics. Included in this goal were development of appropriate roles as employees of Juárez and Associates and techniques for handling potential problems and conflicts that may arise in the field.
4. Role management and fieldwork skills related to interpersonal interaction styles, explanations of the project and the roles of the participant researchers to others; the ability to communicate goals of the evaluation in a fair and consistent way

to those at the Head Start centers and to those in the community.

5. Development of an understanding of the models to be assessed through reading all the materials available to Juárez and Associates concerning each model; and coordination of the researchers with the roles of the test supervisors at each site who were involved in preparations for the pre-test work. Close coordination between participant researchers and testers was an important goal of the training period.

D. Principles of Training

A number of general principles guided the training program. These can be described briefly as simulation based, experience based, skill-building, holistic, and peer-learning based.

The training focused on a series of simulations of the actual fieldwork required of the participant researchers and implementation researchers. After the first day, trainees were in the field practicing a portion of the implementation checklist, introducing themselves, and presenting their role to directors and preschool teachers. These exercises were aimed at providing experiences similar to those that the participant researchers would be likely to encounter in the Head Start classrooms.

Learning was heavily experiential. The training method emphasized that all participant researchers and implementation researchers experience the events that they were then going to discuss, describe, hear a lecture about, or read about. The training was thus carefully designed to create experiences immediately prior to their formal presentation.

The skills necessary for fieldwork -- role management, ethical understanding, fieldwork techniques, interviewing, note-taking styles, and so on -- were presented in small steps, each of which complemented the ones before it and set the stage for the ones afterward. The material was presented as a set of small learnable skills and techniques building to an overall model of a strategy-oriented flexible fieldworker.

The training was holistic and sought to continually interrelate one aspect of fieldwork to other aspects. As a result of synchronization, no one aspect could be learned in isolation as a single skill. Responsibility for integrating all tasks was continually emphasized. One of the major goals of the training was to develop independent judgment and responsibility, which were considered to be essential requirements of the fieldwork role.

The training was deliberately structured to emphasize the peer sharing of field experience. The structure of the training encouraged peer learning, peer interaction, and social synergy, which comes from open, shared understanding about the strengths and weaknesses of each member of the staff. Peer learning was emphasized by the training staff, and it was actively modeled and practiced in the training sessions.

The format of the training modeled the administrative structure of Juárez and Associates. The participant researchers discussed problems and learned procedures with the field supervisors and other members of the Juárez and Associates administrative staff. When problems or issues came up which were clearly identified as needing an

administrative staff solution, the training method was to turn directly to those responsible and to ask for clarification. Thus the actual administrative hierarchy and authority pattern that the fieldworkers would experience the entire year was modeled from the very first in the way the training sessions were structured.

The definition and sequence of skills to be imparted were developed from the job descriptions presented in the Juárez and Associates contract. During each day of training additional skills were presented with the goal of having all relevant aspects covered so that at the beginning of the third and last week of training a full simulation would be possible. The full simulation provided opportunities for evaluation of fieldworker readiness to do their jobs, and identified areas needing further improvements. Skills were introduced in order of difficulty. During the initial sessions trainees were introduced to checklist methods, beginning with the easiest to perform; during the second week the trainees were introduced to increasingly more exact methods of ethnographic classroom observations, including writing and indexing of notes. Finally, issues related to the particular curricula and educational evaluation were presented and discussed, including a session devoted to ethics and a series of background lectures.

E. Timing and Scheduling of the Training

Table 5 shows the schedule of the three-week training period and an outline of the major content areas included at each training period. The training period was intended to prepare the fieldworkers to perform their initial key tasks: collecting implementation data,

TABLE 5

Training Schedule

Week 1: August 6 - August 10. Both Participant Researchers (PRs) and Implementation Researchers (IRs) are in classes all week.

	AM	PM
Monday	Intro: Juárez & Associates	Role management; Introduction of forms
Tuesday	Fieldwork: Use of forms & role management at pre-schools	Discussion and review of completed forms
Wednesday	Fieldwork practice	Discussion of first day; introduction of new checklist procedures
Thursday	Fieldwork practice	Discussion: new checklist procedures
Friday	Introduction to fieldnotes	Write-up of data; review of models and files on each site

Week 2: August 13-August 17. IRs present Monday, Tuesday, and Thursday only.

	AM	PM
Monday	Meeting with Test Supervisors; Staff meeting	Notes & forms: Fieldnote styles & observational strategies
Tuesday	Fieldwork: note-taking and checklists	Converting observations to written notes
Wednesday	Fieldwork: note-taking and checklists	Using index and classification systems
Thursday	Fieldwork: note-taking, checklists and interviews	Field interviewing techniques
Friday	Discussion of fieldwork week. Discussion of ethics & policies	Review of notes and preparation for first simulation day

Week 3: August 20 - August 24. IRs present Monday and Tuesday

	AM	PM
Monday	Full day: Simulation in field	Fieldwork all day
Tuesday	Debriefing and individual consultation with each field-worker	J&A: Orientation on each field site by J&A staff
Wednesday	Full day: Simulation in field	Fieldwork all day
Thursday	Debriefing and individual consultation with each PR	Lecture sessions: (1) participant observation and social science; (2) evaluation research
Friday	J&A: Lecture sessions: (1) bilingual bicultural education; (2) Head Start and early childhood education; (3) laws relating to bilingual education	J&A: Orientation for field travel and final arrangements for consultations at sites

establishing themselves in the field, collecting field notes on focused topics, etc. The training schedule reflects these key goals.

After initial introduction to Juárez and Associates and administrative matters, the first week of the training focused on role management, issues of fieldwork strategy, and actual fieldwork practice in filling out the implementation checklists. By the end of Week 1, field notes and field note-taking were introduced and time to familiarize staff with the models and the testers was built in. During Week 2, further refinements were made in preparations and in the use of implementation checklists, focused interviewing techniques were added, and a major effort was put into the development of fieldwork note-taking skills. A session was also scheduled for the discussion of policy and ethics.

The third week of the training had two days blocked out for simulation. The participant researchers and the implementation researchers were prepared at this point to go into the practice preschool sites and do a full day's work as if they were actually at the Head Start centers. The data collection period included most of the morning hours of the preschools, and the afternoon period included interviewing time and write-up of notes. These materials were then submitted to the Juárez and Associates supervisory staff and consultants for individual review with each participant researcher and implementation researcher for specific feedback and fine-tuning of the fieldwork product (i.e., the checklists, the notes for the checklist, other fieldnotes, and interview data). The goals of the training period were brought into focus on these

simulation days by the emphasis placed on specific familiarization with each site. The staff and the supervisors felt comfortable and confident that they could do a set of specific tasks and skills relevant to the performance of the contract requirements. During the final week of training, background material on participant observation, the history and varieties of evaluation research, practical problem solving for fieldwork methods, and a variety of other background or overview topics were covered. The last day was spent on logistic considerations and other practical aspects of preparing the participant researchers and implementation researchers for actual fieldwork.

F. Specific Content Areas Covered in Training

1. Role Management

Role management and presentation of the research and the research role to others included a number of topics covered throughout the period, as well as some concentrated in the first three days of the training. These topics included the following:

- (a) keeping a diary to record personal feelings and impressions;
- (b) the types of attitudes and feelings likely to be experienced both by the Juárez and Associates fieldwork staff as well as by the Head Start staff and the model developing staff;
- (c) types of labeling and misconceptions concerning the roles of the fieldworkers likely to be held by the model developers and the Head Start staff;
- (d) methods of self-presentation and styles for explaining the field research role and the role of Juárez and Associates as evaluator for the Head Start programs;

- (e) developmental changes in the fieldwork role after the initial period of introduction and how to manage these developmental changes in the area of fieldwork projects, rapport, and interrelationships between staff, parents, model developers, and Juárez and Associates staff.

Specific issues likely to be encountered in the first period of fieldwork were discussed, including interpersonal role relations; the problem of novelty and "framing" of events; the difficulty of maintaining a dual analytic stance in the field; techniques for record keeping and reducing the memory load on fieldworkers, including a number of mnemonic devices; problems of status relationships and status competition; and problems of physical malaise in focusing and channeling energy over a long period of fieldwork time.

Role definition for Head Start center staff was also covered in detail. All researchers and evaluators must learn how to "read" staff at Head Start centers in order to appreciate what role the staff members see the visitor filling. This is crucial since it will affect how staff members behave in the presence of the evaluator and will therefore have an impact on what is observed. Learning to identify the role in which one is placed assists in determining the nature and degree of reactivity which one's presence creates. As expected, several trainees reported comments by the training site staff members which suggested, among other things, apprehension about or indifference to the observations and hostility to bilingual programs. Learning to deal with these comments and feelings professionally and not personally was a center point of the discussions; specific responses to the various reactions were discussed, modeled, and role-played.

Initial focus on rapport building with staff was continually emphasized. Because participant evaluation depends so much on host acceptance, it is important to carefully attend to issues of rapport building and relationship strengthening and extending during initial periods at a site. Several examples were presented by trainees of what they had tried to do to draw out staff members and put them at ease.

One of the training leaders had discussed with a host school director the performance of several trainees on the first field day. This was presented as role management feedback to the group. Among other things, the director had thought it strange that the visitors had declined her offer of storing coats and briefcases in an office; she thought they may have had doubts about security in the school. The trainees were shocked to learn of this interpretation of their actions, since they were motivated to not "impose" upon the staff. Also, the director was critical of the intrusive manner of the trainees, who remained standing all the while, holding their briefcases and coats, and failing to blend into the school routine and surroundings like other staff. Finally, she questioned their competence to do educational evaluations unless they were fully trained preschool workers. All of these issues were discussed as illustrations of the complexities of finding an acceptable role in a Head Start center. Alternative ways of reacting to and following up such information were elicited from the trainees and discussed. Needless to say, this direct field feedback had a powerful effect in shaping the trainees' field role presentations for the remainder of training.

Time was spent developing clear strategies and plans for the fieldwork role in the Head Start centers. This included practice in fieldwork question-generation; the importance of taking responsibility and utilizing self-reliance in the field; not assuming that others necessarily understand one's own role or situation; and being clear about what one's fieldwork needs are. Being certain to have a clear plan with alternatives in mind prior to beginning fieldwork, and the importance of both practicing and rehearsing these plans and fieldwork roles were emphasized.

2. Reactivity and Obtrusiveness

Specific techniques for overcoming reactivity and obtrusiveness in the classroom were discussed, including physical positioning; dealing with interaction by children; movement styles and gaining an appropriate level (that is, being "at the level" of the child and the classroom physically and emotionally); handling overtures for interaction with staff; and timing of fieldwork so as to optimize the opportunities for unobtrusive classroom observations. Differences between the long-term problems of the participant researchers in this regard, compared to the somewhat different responsibilities of implementation researchers, were emphasized.

3. Policy and Ethical Matters

A series of policy and ethical issues were considered and discussed in some detail. These included disclosure rules and confidentiality; illegal or unethical behaviors observed in the field; role conflict between fieldwork and personal obligations; problem

of over-obtrusiveness or over-reactivity in the field; ownership and management of data, including publications, write-ups and presentations; and a number of other areas. A set of field scenarios were written up and distributed to the trainees, and these were used as a basis for discussions.

The aim of presenting ethics and policy issues to trainees was to develop a limited set of "operating rules." The format was the presentation of brief examples of ethical or policy issues. These examples had been given to the trainees two days prior to the ethics session for their consideration. With the field supervisor present, each example was discussed, with the leaders playing devil's advocate in an attempt to force the trainees to make increasingly finer and more difficult judgments about what to do. Role-playing was used to provide practice in dealing with someone who pressed the trainees on controversial issues. Considerable time was given to careful presentation of what the Juárez and Associates contract required and the role of the trainees in such areas as political action and advocacy; premature release of findings or inappropriate public discussions and requests for premature feedback.

4. Fieldwork Strategies and Sampling

A variety of time and event sampling and field techniques were reviewed and practiced by the trainees. These included simple frequency counts; summaries of the daily plan or schedule used in the classroom; time sampling the schedule and events throughout the morning, using spot observations to focus attention on key elements of the model in use in the classroom; sampling those events considered to

be of key importance by the model and Head Start developers at three periods during the morning; and positioning strategies to optimize the likelihood of seeing model implementation during normal morning sessions.

a. Scheduling Effects

As the trainees began to master their roles and duties, they became more capable of observing and less apt to worry about the impression they were making. Predictably, some realized that most classrooms have a definite schedule that structures and organizes most behavior within broad limits. Some did not see this because they focused on behavioral details. A full discussion of scheduling and its effects--intended and unintended--on fieldwork strategies and sampling followed the third day of simulated evaluation. During the discussion it was recognized that the schedule is one major way that curricula are implemented, and that part of the evaluation data to be collected included details on the degree to which the planned schedule was actually implemented. Trainees were asked to present a simulated evaluation of the schedule they had been observing, its effects, and the features which were not fully implemented.

b. Teacher Interactions

The crucial importance of including teaching interactions in the evaluation of curricula was also discussed. Problems of overhearing such interactions, how to record them, etc., without using electronic devices (which present their own problems) point up the field problem that selectivity is inevitable--it is not possible to

record all of what transpires. Trainees were shown various methods of focusing and allowed to practice them. They were then critiqued in terms of what the evaluation contract required.

A videotape from a research school in Hawaii was shown to the trainees. The purpose was to simulate a complicated set of teacher-field behaviors so that they could practice recording them. First, the trainees were asked to watch a few minutes and take notes, with no other instructions. It was clear during the following discussion that many were confused about what to observe, and that various strategies had been used. With each segment of the tape presented, the trainees were given increasingly specific strategies of observation and note-taking to practice.

Two selection strategy issues were discussed at length. First, a skilled, disciplined observer must select from among many possibilities what and whom to observe--an issue related to the immediate goal of observation and involving such mundane but vitally important questions as whether to focus on the teacher or the students. Second, note-taking strategies were also discussed and easily illustrated by having trainees read from their notes. Some used a top-down or holistic descriptive approach; others used a bottom-up or behavioral approach. The advantages of both were discussed in terms of the evaluation to be performed at Head Start centers and in terms of the various curricula under review.

c. Observer Psyching

The importance of self-discipline was considered. Self-discipline includes developing focused attention and a receptive mood in order to

make systematic and careful observations. The importance of presenting oneself in a classroom in an unobtrusive manner was also covered. Nervous movement from one point to another should be avoided. The trainees were advised to relax and sit comfortably. The observer's nonverbal behavior can play a part in achieving a better fit with the environment to be observed, since many staff members are unaccustomed to observers who sit and watch for long periods. Many classroom visitors stay for only brief periods of time, make comments, and often spend more time talking about themselves and their programs than about the classroom situation. It is also important to learn how to map the classroom in order to identify how it is set up as an environment in which people do things. Factors to be determined include the student/teacher flow or movement around the room and the locations from which interactions can be seen without interfering. In addition, the rules and norms of the particular center must be determined and obeyed in order for the observer to be accepted.

5. Note-Taking

Training in note-taking involved four essential skill domains for participant researchers in all field sites. These skills are (1) the development of data-based fieldnotes (including attention to both the level of description and the written form); (2) the formatting, indexing, and cross-referencing of field notes; (3) interviewing techniques; and (4) strategies in naturalistic research/evaluation (including question-generation and the attendant data collection and observational strategies). As there are no rules of thumb on how these separate items are best performed in the field, class

discussions and feedback sessions were designed to allow the researchers themselves to make collective decisions on how particular data collection problems would be solved. This was done to facilitate comparability of research output and greater involvement by the participant researchers with the overall research effort. In addition, since no amount of preparation is sufficient to fully encompass all fieldwork needs or to meet all on-site problems, emphasis was placed on flexibility, self-reliance, and the ability to make data-collection decisions as needed using the skills acquired during the training session.

Instruction in the four skill domains took place over an eight-day period. Class periods alternated with practice fieldwork sessions. Fieldnote skills were either discussed, modeled, or simulated in class, and the participant researchers were given additional fieldwork assignments in order to further practice these skills. When they returned from the field, class discussions were held to debrief them before proceeding to a new skill domain. The emphasis in class was always on fieldworker participation and experiential learning.

Fieldnotes include any written account of a research-related observation. To give the researchers experience in making observations and converting these into narrative reports, the researchers were sent out into preschool centers. When the researchers returned from the preschools, the trainers used their reports to pursue certain major fieldnote topics, including (1) the kinds of information that should be contained in initial field notes (e.g., setting descriptors, names and descriptions of actors, "tone" or "feel" of the

setting); (2) the contextualization of the notes (i.e., indicating time and place where observations were made); (3) the contextualization of the observer (i.e., where the observer was situated, his/her actions and interactions in the setting); (4) length of write-up time and length of written account; (5) the recognition of distinctions between observational "fact" and inference; and (6) the problems in using vague terms for behavioral events. Specific attention was paid to two further features of field notes: style and form. "Form" is defined as how the notes are actually written on paper: i.e., as paragraphs, lists, outlines, etc. Examples from the trainee's notes were shown. "Style" means (1) the level of detail in the notes--from "radical empiricist" (in which micro-level observations are made of specific movements or speech events) to "global/holistic" (in which broad-stroke accounts are made of the surroundings, actors' intentions and behaviors, and the like) and (2) the type of detail--whether the notes are focused on some aspect of behavior or remain completely open-ended.

The researchers had further experience with observational style when they were asked to describe a scene acted out by one of the trainers. In addition, they were asked to select and implement two observational modes (varying in level and type of detail) on the first day at their new pilot field sites. They were asked to rationalize their use of these two styles (in terms of specific observational goals), and to produce a final written account. This exercise was discussed at the next training session meeting.

A final exercise in this section was to help researchers learn techniques for converting complex, multidimensional, rapidly occurring

visual and auditory stimuli into written rough notes. Both observational and notational strategies were emphasized, and the researchers practiced these skills on a videotape of classroom behavior. Observational skills include deciding on a behavioral focus, using pauses in the action to write up earlier behaviors which happened too quickly for full write-up, being aware of the passage of time, consulting informants when in doubt, waiting until something which is strange becomes more familiar, and the like. Notational techniques include the use of glosses, symbols, shorthands, mnemonics, diagrams, open spaces on the note paper, made-up words, and so forth.

Training on these field note skills composed the first two days of fieldnote training.

Formatting, indexing, and cross-referencing field notes were reviewed. "Formatting" refers to the physical form notes will take--size and shape of paper, type of binders, typed or written copies, etc. Formatting also refers to the organization of the notes--e.g., as a daily log, as sequentially arranged narrative accounts, as diaries, or as activity records or other special-purpose files. Trainers used their own materials to familiarize researchers with three different types of formatting practices: topic-centered notes (in which notes are grouped together on the basis of some common research topic), event-centered notes (in which notes are written on complete episodes which may include a variety of individual topics), and person-centered notes (in which interviews and other materials collected from certain individuals are assembled in a single file).

The use of a comprehensive index is the key element in data storage and retrieval systems. Researchers were shown the difference

between an etic indexing system, in which categories of information of prior interest to researchers are imposed on the actual observational data, and an emic indexing system, in which the categories of interest come from the subjects of the study as they perceive and understand the world and from the researcher him/herself as s/he begins to make on-site decisions as to important categories of information. Fieldworkers were taught how to organize classes of information in hierarchical form, assign labels and category numbers to these classes, and operationalize category definitions. They were also shown different ways in which category numbers and written data can be linked (e.g., by entering the category number in the margin next to the written account and then using an index, by entering information directly into a category number file, and so on).

Finally, cross-referencing was discussed. This practice refers to the notation in one fieldnote source of related information entered in another source, and to the use of related index category codes for a given type of information.

After presentation of the alternatives available for organizing fieldnotes, two working sessions were held with the participant researchers and field supervisor to design the system that all would use at their evaluation sites (the resultant system is listed in Section II.F of this report). In addition, researchers were instructed to practice the use of this system in their pilot field sites. Training in these skills composed one entire class session and parts of two others.

Fieldworkers were given a general introduction to interviewing methods. From the range of interview types available, the trainers

chose to emphasize the focused interview in which the researcher has prepared a rough agenda, or interview schedule, to guide his/her questioning on a certain broad topic. More formal interviews in which each informant is asked the same questions in the same order were also discussed. Researchers observed, on videotape, two informal focused interviews and were asked to comment on obvious differences in interviewer style and technique. The discussion allowed the trainers to pinpoint specific skills such as the use of positive and negative probes, diligent listening habits, attention to body posture and other mood indicators, the rephrasing or summarizing of informants' statements, pauses, supportive and appreciative interaction, note-taking, planning and the like. Additional issues such as deciding who would make a good informant and informant sampling were also examined.

The trainees were then given time to develop an interview schedule (on the general topic of changing male/female role relationships in the United States) which they used to interview each other. This was done by dividing the training group into pairs and asking each member of the pair to alternate as interviewer and interviewee for a ten-minute period. After each interview both participants were asked to write up their experience in terms of how they felt about the interview, whether they thought it went well or poorly and why, the specific interview techniques that were used, and ways in which they would change the interview. These accounts became the basis of an additional class discussion on interviewing. The accounts were also meant to teach the researchers to become conscious, active evaluators of their own fieldwork-related performance.

The interview training session occupied one class session, and researchers were also asked to carry out an interview in their pilot field site on an educational topic they considered important. Their interview, the agenda, and their justification for their interview strategy and informant selection were written up and later discussed.

Question-generation and data-collection strategies were discussed throughout the training period, and researchers were constantly reminded that any kind of fieldwork demands that investigators generate hypotheses and questions about the behavior they are observing which, in turn, serve to direct further observations. Thus, the kinds of information sought, and the ways such information is collected (e.g., by interviewing, using behavior checklists, inventories, and so forth) directly stem from the questions being asked.

In order to train the researchers in this area, each was asked to begin formulating general-level research questions related to the pilot sites they were visiting, and then to explore the implications and ramifications of these by specifying further, more detailed questions. They then translated these questions into research strategies: what kinds of information would be needed to answer these questions and how would it be collected? These questions became the focus of two full-day simulations at the field sites, after which debriefing and counseling sessions were held by all trainers. These full-day simulations also had the effect of helping researchers to integrate the various skill domains learned over the past week and of allowing trainers to clear up problems and misunderstandings. It was also possible to make sure that participant researchers were making similar kinds of observations and using comparable organizational schemes.

6. Lecture and Discussion Topics, and Definition of Implementation Evaluation

The implementation research strategy was discussed in detail and was broken down into an analysis of the intended elements of each model as they appeared at each Head Start site; the actual variations from the original model which had been planned and prepared by either the Head Start center or the model developers or both; and the unplanned variations and unnoticed aspects of implementing the model which are not conscious or clearly prepared for by the developers or the Head Start sites, yet which are visible and will need to be monitored by the researchers. Consideration of different types of consequences of implementation were reviewed, including intended consequences (those hoped for or planned for by the model and Head Start staff) as well as unintended, unnoticed, or unobserved consequences noted by the fieldworker and added to the implementation assessment forms.

Lecture topics included a brief history of participant observation in the social sciences, particularly in anthropology and psychology. Questions of validation and reliability were discussed, as were some of the epistemological foundations of the procedure. Commonly asked questions concerning obtrusiveness and reactivity of participant fieldwork were presented, and some useful answers and research tactics were discussed. Various training methods for teaching participant observation in the United States were reviewed and compared to the methods followed in the Juárez and Associates training workshops. Readings in the participant

observation field were discussed and were available to the trainees, and a series of sections from well-known field workers' monographs or diaries were xeroxed and handed out.

Lecture materials were also presented on issues in evaluation research in education, and particularly on the importance of implementation research, teacher-training, and context-specific evaluations.

7. Evaluation and Outcome Criteria

The training set up a criterion-based outcome or assessment procedure. Given the time available for training, this was the most effective method for assessment of results. The final Monday and Wednesday of the training period were full simulation days. On Tuesday and Thursday of the final week the actual field notes, ratings, interviews, etc., of each trainee were individually judged for completeness, adequacy of comprehension, and procedures by the Juárez and Associates staff. Thus the major criterion for effective training was the production by the trainees of a full set of field materials produced to the satisfaction of the staff during the final week. This was attained to a degree judged adequate to begin the initial implementation data collection and the initial collection of field notes.

The reliability of the ratings, interviews, and notes cannot be assessed apart from their validity and context. Thus, estimates of field reliability will be judged using the field supervisor visits to each Head Start site. At this stage the Juárez and Associates field supervisors and research data collectors will assess reliability

from the point of view of the accuracy and completeness with which the forms were filled out. That is, it will be determined whether the techniques and procedures used meet the criteria for reliability which were set up when the forms were developed. Whether the data themselves were reliably collected will depend on the field sweep visits by Juárez and Associates staff after the fieldworkers are on-site. Reliability data collected in Los Angeles at non-bilingual preschool centers during the month of August would not be adequate.

After a full day of simulation at a field site, each trainee presented his/her work for criticism and review. Each item was gone over and checked, including checklists, notes, and indexes. Following this, a discussion of the dimensions of skill required for the job to be performed generated the self-assessment list. Trainees were asked to complete these self-assessment lists (see Appendix 8) by which they rated their own performance in a number of areas, and to suggest areas in which they needed improvement or in which they would like further training from Juárez and Associates. This is a highly valuable method for self-improvement supplementing externally imposed reliability checks, which often do not carry any further value for improvement and review by the data collectors themselves.

G. Orientation by Juárez and Associates Staff

An integral part of the training process of participant researchers and implementation researchers was dedicated to general orientation by Juárez and Associates staff. This orientation covered various dimensions of the Head Start evaluation project and bilingual education in general. Topics focused on the biophysical and sociocultural

environments of each site, the philosophy of the curriculum models under observation, the physical and psychological developments of young bilingual children and the historical and contemporary implications of bilingual/bicultural education. Each of these topics were succinctly discussed in order to provide background information to the fieldworkers.

1. Site Orientation

The project director of the Head Start evaluation, Dr. Luis C. Moll, presented a short summary of the eight evaluation sites, emphasizing the biophysical and sociocultural environments of each locale. Highlighted were the physical setting and the economic background of each site as well as the social organization and local power structures in which these Head Start centers are found. In addition, the director provided a brief presentation on the organization and structure of the Head Start centers and their relationship with the communities. The purpose of this presentation was to provide background information for participant researchers and implementation researchers on the sites where they will be collecting data.

2. Developmental Level of Head Start Children

Another session was devoted to a presentation on the developmental level of Head Start children by the project co-director, Dr. Ray S. Pérez. Covered under this topic were various theories of child development with special emphasis on the Piagetian theory of cognitive development. The various stages of child development were

discussed, though emphasis was placed on specific examples of behavior that four year olds are likely to exhibit. This presentation briefed the participant researchers and implementation researchers on leading theories bearing on the cognitive, socioemotional and psychomotor developments in four year olds. Although all fieldworkers had had previous experience with small children, the presentation and discussions served as a refresher to the characteristics of the target population under observation in the Head Start evaluation sites.

3. Historical and Contemporary Implications of Bilingual Education

A presentation entitled "Bilingual Education - Historical Perspectives," which was given by the Juárez and Associates staff specialist in early childhood development, began with a brief discussion of the Compensatory Education Movement in the United States and moved on to a general orientation regarding present-day instructional practices for non-English speaking and limited English speaking students. Additionally, the theoretical undercurrents prevalent during the 1960s and early 1970s were outlined (the deficit to difference models). Legislative and court actions that have helped define bilingual/bicultural education were also discussed. This background information aimed at sensitizing participant researchers and implementation researchers to the issues influencing bilingual education programs in general and bilingual education in the Head Start sites in particular.

4. Curriculum Models at Head Start Sites

The commonalities and distinctive features across and between models were the focus of the presentation entitled "Orientation to Models." This presentation addressed the policy guidelines governing bilingual/bicultural curricula implemented at Head Start sites. The Administration for Children, Youth and Families has set forth three basic principles for bilingual/bicultural curriculum development. First, each curriculum must reflect the needs of the population it serves; second, both the curriculum materials and the staffing patterns must reflect the racial and ethnic population of its clients; and third, the curriculum must include parents in the operation of the programs. These principles were highlighted as relevant to all models.

Differences between models were also addressed. Each specific model was analyzed according to its particular orientation to child development theory, bilingual/bicultural education, and language instruction. These dimensions form the core of each model's bilingual/bicultural approach. Hence, the participant researchers and implementation researchers gained an overall knowledge of the models focusing in depth on the particular models at their sites.

V. Recommendations

This section discusses the status of the ethnographic component of the evaluation. First, the observational instruments and procedures are summarized and recommendations for continued development and additional measures are made. Second, the training process is examined and the nature of additional training and debriefing phases considered. Finally, the tentative schedule for ethnographic data collection during the entire evaluation is outlined in light of issues in methodology, quality control, and logistics.

A. Instrument Development

1. Implementation Forms

The instrument developed by Juárez and Associates provides a multimeasure means of assessing implementation. Model specific checklists, frequency counts, rating scales, and informal interviews with teachers, aides, and parents will be used to collect data on the model classrooms over time. Results of initial piloting indicated that forms A and B of the instrument were relatively easy to use, as the agreement of untrained raters was, in all but one case, at least 67 percent.

The third part of the instrument was more problematic and was subjected to extensive changes in format during the training sessions. As training sites did not offer an environment equivalent to that to be found at the replication sites, it is recommended that participant researchers continue to calibrate the content of the forms

to the realities of the functioning model during their first month on site. The results of their observations should be forwarded to the coordinator/supervisor for intramodel standardization and coding by the end of September. It is further recommended that, as a control on implementation data quality, the coordinator/supervisor or data manager make parallel observations at all replication sites during the implementation data collection. It is also suggested that at the mid-year implementation data collection point, participant researchers and implementation researchers within a model exchange sites for the two-week period in order to minimize the effects of socialization to a particular site.

2. Ethnographic Notes

Notes consisting of narrative accounts, logs, inventories and other written formats, where appropriate, are to be kept for observations related to classroom behaviors and model implementation. Four separate note files--topics, events, attitudes, and individuals--have been created and an indexing strategy which combines an etic and emic approach has been created. This indexing system is three-tiered: the first contains four superordinate category codes and a series of subordinate ones; the second tier will also include etic categories which result from topics of concern to each of the four curriculum models; the third will contain emic categories generated by each fieldworker and reflective of local concerns. It is recommended that the coordinator/supervisor in conjunction with the data manager monitor the data filing system, supplying a complete list of categories, code numbers, definitions, updates, and additions to all

fieldworkers through supplemental sheets. In addition, it is recommended that the coordinator include note taking on specific categories within each of the three tiers as a check on data accuracy and observe drift during his parallel observations.

3. Time and Event Samples

Systematic procedures for sampling behaviors in various classroom contexts were developed during the fieldworker training. Researchers were trained to select target children or events and assess a variety of behaviors and/or interactions within different structured time periods. It is recommended that these methods be pilot tested by the participant researchers during their first month on site and that the results of this piloting be sent to the coordinator, who will standardize procedures appropriate to each model for collecting implementation data. As at the completion of training all of the sites had not complied with their contractual obligations related to the recruitment of children for randomization, and as it appears that alternative strategies for securing a control group may be used at some sites, it is recommended that selection of the subsample of children for intensive observation be delayed until after the completion of the psychometric testing component of the evaluation. Such a delay would allow the participant researcher to provide Juárez and Associates with a list of the regular attendees which will be stratified on variables such as language and sex, and from which a random sample will be drawn. A comparable sample will then be drawn from the control group at each site. A first data collection point for observations of individual children should then

be used to pilot different sampling strategies. The information generated from such piloting will be used to construct standard recording sheets for each model which will be used in subsequent observations.

4. Phone Call Updates

The subsample of experimental and control group parents will be called approximately every three months after the initial interview. The calls will provide information on the out-of-school experiences of the children in a number of areas such as language use, exposure to other educational and preschool experience, and peer interactions. It is recommended that such updates be predicated on the parent interview in a format which allows the interviewer to ask if there has been any change in the situations as described in the original interview. However, as the parent interview has not received Office of Management and Budget clearance as of this writing, it is recommended that the update format remain in prototype form until the approval of the parent interview, at which time specific acceptable items can be identified. Additionally, as it was impossible to train the implementation researcher in the application and supervision of the parent questionnaire, it is recommended that interview supervisors be hired and trained to administer the instrument at the earliest possible date.

5. Socioemotional Rating Forms

Rating scales for assessing socioemotional behaviors considered to be important by all models have been developed and piloted. The .96 internal consistency and .83 interrater agreement for the five

point scale to be used by test examiners and .85 internal consistency and .71 interrater agreement for the seven item teacher instrument indicate that the instruments were reliable and easy to use. It is recommended that the examiners' instrument be used after the final test session with each child during the pre- and posttest. This will provide data on each experimental and control child's socioemotional development in a specific context. Teachers should rate each child after the first two weeks in the classroom and during the last two weeks of school, thereby furnishing a general measure of overall socioemotional development of experimental children. It is suggested that, in cases where a control group is used, the health services worker rate control children using the teacher instrument, and that where a comparison preschool is used, teachers in those institutions rate the children. Rating scale data should be combined with fieldworkers' observations and the data provided by phone call updates as a multi-indicators of socioemotional development.

B. Training

The initial fieldworker training session was conducted for a three-week period and covered a variety of observational techniques utilized in qualitative research. The basic training strategy emphasized actual field experiences. The trainees were sent out to the field to do general observations at local preschools in the morning and met with trainers in the afternoon for group discussions relating to field experiences. This dialectical approach to training proved to be valuable not only in the training of individuals but also in the cumulative refinement of diverse data collecting instruments. The inductive process of procedure and instrument generation and refinement involved the trainees in the creation

of the instruments and ensured ongoing calibration on site.

It is recommended that a second participant researcher training session be scheduled to take place for a two-week period in early December. This second training session should focus on more fine-grained observation aimed at gathering specific context-based behavioral information. One such aspect may emphasize more detailed language observations of individual children. For instance, the participant researchers may be trained to record concrete grammatical constructs of children such as subjunctive usage in Spanish or conditional usage in English and so on. Also, more detailed language sampling checklists could be developed to yield frequency tabulations of linguistic data in a simple-complex continuum. As a result of their field experiences, it is expected that participant researchers will be in a position to make significant contributions to both the additional training and the development and recalibration of observational instruments.

It is recommended that the participant researchers make suggestions regarding implementation and sampling instruments during the course of the first field session, that is, in the first month following the initial training period. These suggestions will be utilized for further refinement and development of instruments during the second training session in early December.

One of the important functions of the second training session is completion of the development of the time and event samples. These instruments will be used for the observations of the focal children. As part of this process the participant researchers will be piloting the time and event samples at local bilingual Head Start

sites, and in so doing, they will help modify or change the instruments.

It is also anticipated that the second training session will be appropriate for discussions of issues that have evolved during the first three months of the study. This will include a review of the participant researchers' role. This means a clarification of any ambiguities in their role as data collectors that may have resulted from their initial field experiences.

C. Scheduling

Appendix 1 illustrates the schedule for ethnographic data collection, highlighting methodological, quality control, and logistic considerations. Of special concern are the monitoring of data quality, fieldworkers' observation progress, and control of reactivity.

The timeline was designed to deal with the various constraints documented in the body of this report. On-site placement and initial data collection are scheduled to take place during the month of September. At that time, fieldworkers will concentrate on collecting data on the environmental and social contexts of the Head Start sites rather than on classroom observation so as not to interfere with the testing of the children taking place concurrently.

Participant researchers and implementation researchers will collect curriculum implementation data at three different points in time during the school year. The first period is planned for the month of October; the second will take place during two weeks in January; and the last during the month of April. The rationale behind this strategy of data collecting is grounded on the fact that implementation

is conceived as a dynamic and ongoing process that will change over time.

The classroom observation of a subsample of experimental children and the spot checks are designed to complement each other. The subsample observation will take place for two-week periods at three different points in time. Once specific behaviors and contexts are identified, spot checks will be conducted at intervals to monitor patterns of behavior and curriculum implementation. The spot checks are intended to assure accuracy of data collection and are a relatively unobtrusive way of following progress in the classroom with a minimal amount of reactivity.

There will be two phone call updates made to parents of a subsample of treatment and control children. The first is scheduled to take place in early December, following the administration of the parent questionnaire during the month of October. The second phone call update is scheduled for March. These two parent interview follow-ups are to be done at three-month intervals in order to ascertain, for example, whether control children are enrolled in other programs that can possibly affect their educational development.

With the exception of the month of December, the fieldnotes will be an ongoing process for the entire school year (September to June). Fieldnotes provide general background data for the sampling and implementation instruments, as well as specific information not provided by sampling instruments.

Similarly, the phone call checks by the supervisor will be an ongoing process that will take place throughout the entire school year. With the exception of the two three-week periods when the

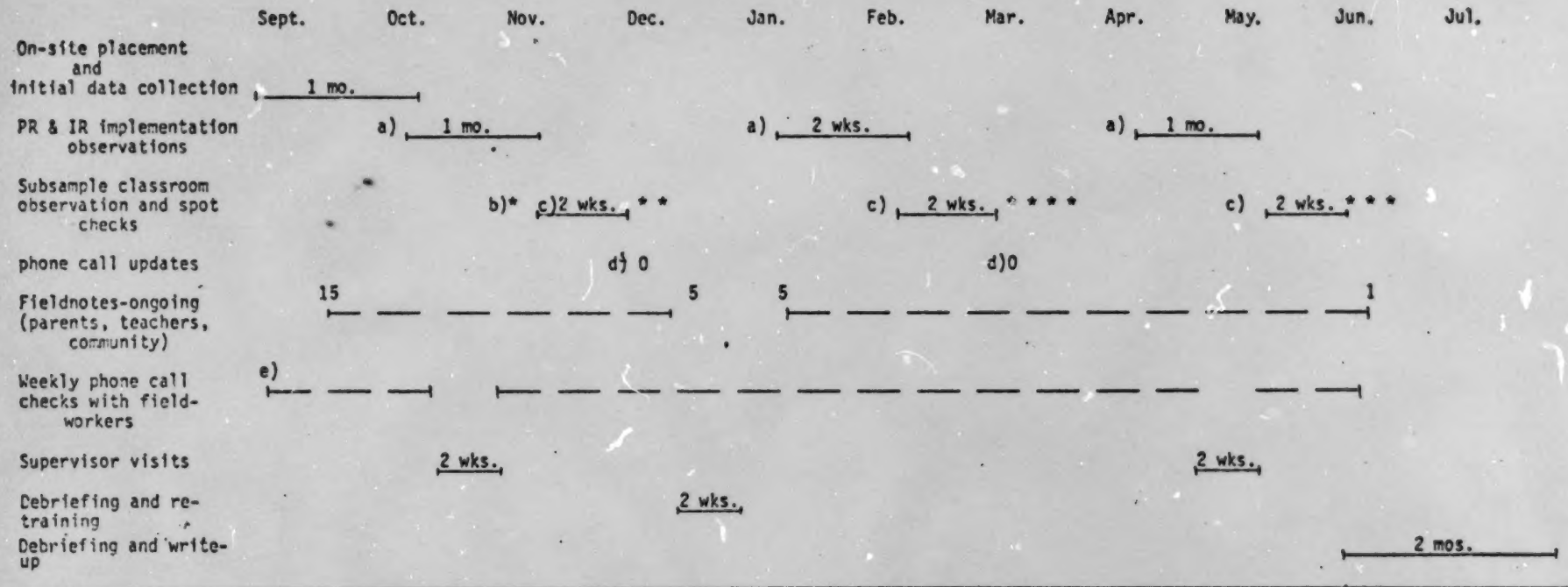
supervisor is making field visits to different sites, weekly phone calls will be made from the field supervisor's office to monitor the observational progress of fieldworkers.

The field supervisor's visits to Head Start sites are designed as a further check of accuracy. Parallel observations conducted by the field supervisor and the participant researchers at two different points in time are meant as a control on data accuracy.

Two weeks in early December are scheduled for debriefing and retraining of fieldworkers. As pointed out earlier, the training had to be divided into two sessions at different periods. The second training session will afford the opportunity to share experiences gained subsequent to the first training period as well as discuss, refine, and develop further observation instruments. It is expected that participant researchers will contribute valuable inputs during this second training period.

Finally, the months of June and July will be spent in debriefing and writing up a final report on the year's work. At this time, the fieldworkers will also be expected to contribute to the writing of manuals.

Timeline For Collecting Observational Data



- a) Ten-day observations during this time span.
 b) * = spot check.
 c) Two-week observation of focal children (PRs only)
 d) 0 = phone call update made to parents of subsample.
 e) Phone call checks with fieldworkers will be done on a weekly basis except when the supervisor is out in the field.

Activities:

Classroom: _____

Date: _____

1. _____
2. _____
3. _____

Time:

1. _____
2. _____
3. _____

Directions: This checklist should be used three times during the school day. The first time should be about a half an hour after the start of school. The subsequent two observations should take place at appropriate intervals (approximately 45 minutes or so) that will optimize the opportunity to observe model implementation. In the spaces provided above, describe the general activity during which the observation takes place (i.e., planning time, recall time, clean-up time), then fill in the appropriate box for each item below.

Schedule & Organization

There is a schedule posted
which includes:

Planned

Yes

No

1. planning time
2. work time
3. clean-up time
4. activity time
5. recall time
6. group time
7. circle time

Yes	No

Intended

Yes

No

Yes	No

Observation PeriodsSetting and MaterialsA

Not Present	Observed Not in Use	Observed In Use

B

Not Present	Observed Not in Use	Observed In Use

Not Present	Observed Not in Use	Observed In Use

House area

Quiet area

Block area

Art area

Construction area

Music area

Sand and water area

Plant and animal area

Group area

ABC

Not Observed Observed
Present Not in Use In Use

Not Observed Observed
Present Not in Use In Use

Not Observed Observed
Present Not in Use In Use

Outdoor play area
closets

Areas separated by
dividers (storage
shelves, cartons,
etc.)

Materials accessible
in each area

Materials visible to
adults and children

Materials are labeled
in Spanish and English

Each area has room for
several children (at
least 3)

Sufficient space between
areas (one adult can
pass comfortably)

Materials related to
different cultures

Variety of materials
which children can
touch, smell, listen
to, taste

Sufficient material in
each area for at least
3 children to work

Individual

Yes A No

Yes B No

Yes C No

Teacher uses both languages to give directions

Teacher encourages children to use second language

Teacher uses names of areas in both languages

Teacher helps children to plan

Aide uses both languages to give directions

Aide encourages children to use second language

Parent takes part in classroom activities

Parent involved in planning

Parent encourages children in second language

Children work together regardless of language differences

Children talk in both languages about things they have done

Activities

Planning session of teacher(s)/ aide(s)/parent(s)

report of children's actions
discussion of key experiences
discussion of daily routine
discussion of seasonal themes
or field trips

Dated examples of each child's work

Parents attend planning meeting

PART B

Un Marco Abierto (High Scope)

Directions: The purpose of Part B is to count elements identified as key features in the curriculum. Review the schedule and select three periods when instructional activities are clearly taking place. Sweeping the room with your eyes and moving around the room as necessary, count each specific variable listed below. Continue to sweep and move about the room until all of the questions are answered. Repeat these sweeps three times at the appropriate periods.

Observation Period

	<u>A</u>	<u>B</u>	<u>C</u>
Number of distinct areas which are visible in the room	_____	_____	_____
Number of areas which have materials	_____	_____	_____
Number of areas which have materials within reach of children	_____	_____	_____
Number of materials labeled in Spanish and English	_____	_____	_____
Number of children engaged in planning	_____	_____	_____
Total number of children in the class	_____	_____	_____
Number of children working alone	_____	_____	_____
Number of children working with teacher	_____	_____	_____
Number of children working with aide(s)	_____	_____	_____
Number of children working together in a group of 3 or more	_____	_____	_____
Number of teachers present	_____	_____	_____

	<u>A</u>	<u>B</u>	<u>C</u>
Number of aides present	_____	_____	_____
Number of parents present	_____	_____	_____
Number of conversations in Spanish	_____	_____	_____
Number of conversations in English	_____	_____	_____
Number of parents observed sharing ideas with children	_____	_____	_____
Number of parents observed conversing with children in Spanish	_____	_____	_____
Number of parents observed conversing with children in English	_____	_____	_____
Number of parents observed conversing with staff in Spanish	_____	_____	_____
Number of parents observed conversing with staff in English	_____	_____	_____
Number of identified key experiences from model plan observed at activity centers or in teacher/child, staff/child interactions	_____	_____	_____
Key experience focused on active learning of child	_____	_____	_____
Key experience utilizing language skills	_____	_____	_____
Key experience utilizing direct representation and practice with materials	_____	_____	_____
Key experience focused on classification of objects or concepts	_____	_____	_____
Key experience emphasizing association	_____	_____	_____
Key experience emphasizing the use of numbers	_____	_____	_____
Key experience emphasizing the uses in organizational space	_____	_____	_____
Key experience utilizing concepts of time	_____	_____	_____
Key experience emphasizing the sequencing of events in time	_____	_____	_____
Key experience emphasizing bilingual or multicultural content explicitly and overtly	_____	_____	_____

Number of children observed using art
media to represent something accomplished

Number of children observed writing, tracing,
or copying written or art material

Number of children observed reading or being
read to or in a reading area

PART C

Un Marco Abierto

Directions: This section is an overall assessment of the frequency, intensity, amount, or number of things reflective of the mode in use which took place in the classroom during a day. The ratings should be made at the end of a day's observations and incorporate all of the time you were actually doing observations. Make your judgments using the sampling strategy most appropriate for your site.

1. Estimate the total time each of these areas was in use.

_____ house area
_____ block area
_____ quiet area
_____ group area
_____ art area

_____ construction area
_____ music area
_____ sand area
_____ animal & plant area
_____ outdoor play

2. Number the following activities in sequence of

_____ work time _____ clean-up _____ circle time
_____ activity time _____ planning time
_____ recall time _____ group time

3. Activity groups: How many times did a clearly demarcated activity occur where it was structured as a

_____ large group (over 1/2 of children present) teacher-directed activity
_____ small group (less than 1/4 of children present) teacher-directed activity
_____ adult-child dyadic activity
_____ independent activity by individual children

4. Overall, rate each category of person for the proportion of Spanish or English spoken throughout the morning in all settings:

A. Teachers

1 2 3 4 5

All or nearly
all Spanish

About
equally mixed

All or
nearly all
English

B. Parents

1	2	3	4	5
All or nearly all Spanish		About equally mixed		All or nearly all English

C. Aides

1	2	3	4	5
All or nearly all Spanish		About equally mixed		All or nearly all English

D. Children

1	2	3	4	5
All or nearly all Spanish		About equally mixed		All or nearly all English

5. CODE SWITCHING: FOR EACH ADULT-TO-CHILD CATEGORY, MAKE A JUDGMENT CONCERNING THE EXTENT OF LANGUAGE-SWITCHING WHEN TALKING WITH THE SAME CHILD OR GROUP

A. Teachers

1	2	3	4	5
Same language used throughout interaction sequences		Some language switching, some consistency, in equal amounts		Constant use of language switching throughout interaction sequences

B. Parents

1	2	3	4	5
Same language used throughout interaction sequences		Some language switching, some consistency, in equal amounts		Constant use of language switching throughout interaction sequences

C. Aides

1	2	3	4	5
Same language used throughout interaction sequences		Some language switching, some consistency, in equal amounts		Constant use of language switching throughout interaction sequences

6. Rank-order what parents did most often in the morning:
- ☐ planned and evaluated
 - ☐ translated
 - ☐ helped teacher
 - ☐ provided input
7. Did you observe a teacher planning session? Yes/No
- If so, how many? _____
- length? _____
8. Number of times observer noticed child-child arguments settled verbally without direct adult intervention. _____
9. Number of times observer noted arguments or fights occurring where adult intervened. _____
10. How many activities or situations occurred where there appeared to be a clear set of rules for sharing and taking turns? List number. _____
- How many children were observed in these situations? _____
11. How many children were ever observed attempting to interpret or translate into Spanish or English for other children? _____
12. How many children were observed attempting to interpret or translate from English to Spanish for other children? _____
13. How many explicit statements indicating positive feeling and appreciation for Hispanic or Anglo-English culture were heard or noticed during the morning between children or between children and two adults? _____
- How many from adults to children? _____
14. Did the daily routine for this day involve periods when children planned, worked, and reviewed their own activities without direct adult intervention? Yes or No. _____
- If yes, how many children had at least some period of time when they were observed to work on or plan an activity on their own without direct adult intervention? _____
15. How many adults were observed more than once clearly supporting or encouraging the child's own independent activity? _____
16. Is the number of adults equal to all the adults in the classroom that morning who were either acting as teachers, aides, or parent volunteer teachers? Yes or No. If no, how many parents were observed in these roles only once? _____

PART D

Un Marco Abierto

Directions: Using these general topics as a guide, inquire into the perceptions of the teacher, aides, and parents as to the day's events.

- A. Planning
- B. Daily Activities
- C. Meetings
- D. Role of Aides (or Parents)
- E. Overall View of Head Start
- F. View of Program
- G. Children's Attitudes
- H. Other

Classroom: _____

Date: _____

Activities:

1. _____

2. _____

3. _____

Time:

1. _____

2. _____

3. _____

Directions: This checklist should be used three times during the school day. The first time should be about a half an hour after the start of school. The subsequent two observations should take place at appropriate intervals (approximately 45 min. or so) that will optimize the opportunity to observe the model implementation. In the spaces provided above, describe the general activity during which the observation takes place (i.e., planning time, recall time, etc.), then fill the appropriate box for each item below.

Schedule & Organization

There is a schedule posted
which includes:

1. large group, teacher-directed activities
2. small group, teacher-directed activities
3. individual activities
4. artistic activities
5. circle times
6. activities in the first language
7. activities in the second language
8. active activities
9. quiet activities
10. time for parental participation

Planned

Yes

No

Intended

Yes

No

Setting & Materials

	Not Present	^A Observed Not in Use	Observed In Use
Dramatic play area			
Block area			
Arts and crafts area			
Woodworking area			
Discovery area			
Small group area			
Large group area			
Area for personal belongings			
Music area			
Manipulative area			
Materials available in each area			
Materials are within reach of children			
Sand & water area			
Materials representative of different cultures			
Classroom clean (no obs- tructions interfering with people movement)			

Observation Periods

	Not Present	^B Observed Not in Use	Observed In Use

	Not Present	^C Observed Not in Use	Observed In Use

Individuals

	<u>A</u>		<u>B</u>		<u>C</u>	
	Yes	No	Yes	No	Yes	No
Children using an area alone						
Children working in group						
Parents serving as teaching assistants						
Parent preparing materials						
Parent speaking Spanish with a child or group						
Parent speaking English with a child or group						
Aide speaking Spanish with a child or group						
Aide speaking English with a child or group						
Teacher speaking Spanish with a child or group						
Teacher speaking English with a child or group						

Activities

Activities allowing classification from easy to difficult						
Activities allowing seriation from easy to difficult						
Activities reflecting the home						
Parents attend meetings						
Activities in first language						
Activities in second language						
Group activities						
Individual activities						

PART B

-111-

Amanecer

Directions: The purpose of Part B is to count elements identified as key features in the curriculum. Review the schedule and select three periods when instructional activities are clearly taking place. Sweeping with your eyes and moving about the room as necessary, count each specific variable listed below. Continue to sweep and move around the room until all of the questions are completely answered. Repeat these sweeps three times at the appropriate periods.

A B C

- | | | | |
|--|-------|-------|-------|
| 1. How many distinct curricular areas are there in the room? | _____ | _____ | _____ |
| 2. How many areas have materials? | _____ | _____ | _____ |
| 3. How many areas have materials representing different cultures? | _____ | _____ | _____ |
| 4. How many areas have materials labeled in Spanish? | _____ | _____ | _____ |
| 5. How many areas have materials labeled in English? | _____ | _____ | _____ |
| 6. Number of different groups of children in the room (dyads, small and large groups)? | _____ | _____ | _____ |
| 7. Number of individual child activities taking place? | _____ | _____ | _____ |
| 8. Number of quiet activities taking place(reading etc.)? | _____ | _____ | _____ |
| 9. Number of active activities taking place(dancing etc)? | _____ | _____ | _____ |
| 10. Number of teacher-directed activities? | _____ | _____ | _____ |
| 11. Number of adult-directed activities(parents etc.)? | _____ | _____ | _____ |
| 12. Number of learning center activities? | _____ | _____ | _____ |
| 13. Number of parents preparing materials? | _____ | _____ | _____ |
| 14. Number of first language activities taking place? | _____ | _____ | _____ |
| 15. Number of second language activities taking place? | _____ | _____ | _____ |
| 16. Number of aides speaking Spanish? | _____ | _____ | _____ |
| 17. Number of aides speaking English? | _____ | _____ | _____ |
| 18. Number of teachers speaking Spanish? | _____ | _____ | _____ |
| 19. Number of teachers speaking English? | _____ | _____ | _____ |
| 20. Number of parents speaking Spanish? | _____ | _____ | _____ |
| 21. Number of parents speaking English? | _____ | _____ | _____ |

PART B (cont.)

-112-

Amanecer

A

B

C

22. Number of room dividers?

23. Number of children's art used as decorations?

24. Number of representations of children's work?

25. Number of Spanish speaking children groups?

26. Number of English speaking children groups?

Amanecer

Directions: This section is an overall assessment of the frequency, intensity, amount, or number of things reflective of the model in use which took place in the classroom during the day. The ratings should be made at the end of a day's observations. Make your judgements using the sampling strategy most appropriate for your site.

1. Estimate the total amount of time each of the following areas was in use today.

_____ art area	_____ library area
_____ dramatic play area	_____ blockbuilding area
_____ discovery area	_____ woodworking area
_____ music area	_____ sand & water area
_____ Manipulative play area	_____ area for personal belongings

2. Estimate the total amount of time devoted to the following activities today.

_____ quiet activities	_____ active activities
_____ teacher-directed activities	_____ outdoor activities
_____ individual child activities	_____ circle times
_____ learning center activities	_____ small group activities
_____ large group activities	_____ manipulative activities

3. Estimate the total amount of time spent in each of the following type of activities today.

_____ child to child interaction	_____ child to adult interaction
_____ child-material interaction	_____ activities in Spanish
_____ activities in English	_____ activities in both languages
_____ activity reflected weekly plan	_____ teacher personalized learning experiences
_____ teacher designed culturally relevant experiences	_____ teacher referred to keeping up folders
_____ teacher developed child's home language	_____ teacher expands upon children's questions
_____ child encouraged to use language	_____ teacher used curriculum kits

PART C (cont.)

Amanecer

4. Number of times teachers praised children while child was on task _____
5. Number of times teachers made positive valid statements about program _____
6. Number of times teachers praised parents for classroom involvement _____
7. Number of times teacher modeled language use _____
8. Number of times parents prepared materials _____
9. Number of times parents helped teach _____
10. Number of times parents provide inputs for future parent meetings _____
11. Number of times parents organize a party or special project _____
12. Number of positive verbal statements made by parents about program _____
13. Number of negative verbal statements made by parents about program _____
14. Number of positive verbal statements children made about themselves _____
15. Number of negative verbal statements children made about themselves _____
16. Number of positive verbal statements adults made to promote pride
in culture _____
17. Number of negative verbal statements adults made about culture _____

PART D

Amanecer

Directions: Using these general topics as a guide, inquire into the perceptions of the teacher, aides, and parents as to the day's events.

- A. Planning
- B. Daily Activities
- C. Meetings
- D. Role of Aides (or Parents)
- E. Overall View of Head Start
- F. View of Program
- G. Children's Attitudes
- H. Other

PART A

Alerta (Teachers College)

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Classroom: _____

Date: _____

Activities:

1. _____

2. _____

3. _____

Time:

1. _____

2. _____

3. _____

Directions: This checklist should be used three times during the school day. The first time should be about a half an hour after the start of school. The subsequent two observations should take place at appropriate intervals (approximately 45 min. or so) that will optimize the opportunity to observe model implementation. In the spaces provided above, describe the general activity during which the observation takes place (i.e., planning time, recall time, clean-up time, etc.), then fill in the appropriate box for each item below.

Schedule & Organization

There is a schedule posted which includes:

1. preparation time

2. work time

3. clean-up time

4. parent-directed activities

5. aide-directed activities

6. large group activities

7. small group activities

8. active & quiet activities

9. first & second language activities

Yes Planned No

Yes Intended No

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Setting & Materials

	<u>A</u>			<u>B</u>			<u>C</u>		
	Not Present	Observed Not in Use	Observed in Use	Not Present	Observed Not in Use	Observed in Use	Not Present	Observed Not in Use	Observed in Use
A variety of materials in each area (shells, spoons tin cans, etc.)									
Materials representative of different cultures									
Materials labeled in Spanish & English									
Materials which allow classification (scaled down animals & people)									
Materials which can be put in a series (sticks of different lengths)									
Materials to sequence or pattern (puzzels etc.)									
Illustrations of urban environment									
Illustrations of different culture groups									
Displays of children's work									
Pictures of famous - historical figures from different cultures (Benito Juárez, Simón Bolívar, Abe Lincoln)									

Observation Periods

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Setting and Materials

A

Not Observed Observed
Present Not in Use in Use

B

Not Observed Observed
Present Not in Use in Use

C

Not Observed Observed
Present Not in Use in Use

Art Area

Block Building Area

Family Corner

Sound Area

Water Movement Area

Music Area

Table Materials Area

Library Area

Family Corner and Block
Area Contiguous

Block Area Located at
Opposite End of Room
From Library

Quiet Area & Library
Contiguous

Art Area & Water Area
Contiguous

Areas in Gloom

All Areas Have Room for
at Least 3 children

Individuals

Observation Periods

	<u>A</u>		<u>B</u>		<u>C</u>	
	Yes	No	Yes	No	Yes	No
Adult-directed activities						
Child-directed activities						
Children grouped for instruction						
Child(ren)-adult interaction						
Child(ren)-child(ren) interaction						
Child(ren)-materials interaction						
Parents in the classroom serving as aides						
Parents preparing materials						
Parent speaking Spanish						
Parent speaking English						
Aide speaking Spanish						
Aide speaking English						
Teacher speaking Spanish						
Teacher speaking English						
<u>Activities</u>						
Aides arranging home visits						
Aide using observation checklist to assess individual growth						
Children speaking in both languages						

Alerta Teachers College)

Direct n: The purpose of Part B is to count elements identified as key features in the curriculum. Review the schedule and select three periods when instructional activities are clearly taking place. Sweeping the room with your eyes and moving around the room as necessary, count each specific variable listed below. Continue to sweep and move about the room until the questions are completely answered. Repeat these sweeps three times at the appropriate periods.

	<u>Observation Periods</u>		
	<u>A</u>	<u>B</u>	<u>C</u>
How many distinct areas are there in the room?	_____	_____	_____
How many areas have materials?	_____	_____	_____
How many areas have materials representing different cultures?	_____	_____	_____
How many areas have materials labeled in Spanish and English?	_____	_____	_____
Number of different groups in the room	_____	_____	_____
Number of active activities taking place	_____	_____	_____
Number of quiet activities taking place	_____	_____	_____
Number of first language activities taking place	_____	_____	_____
Number of second language activities taking place	_____	_____	_____
Number of adult-directed activities	_____	_____	_____
Number of child directed activities	_____	_____	_____
Number of children working alone with materials	_____	_____	_____
Number of aides speaking Spanish	_____	_____	_____
Number of aides speaking English	_____	_____	_____
Number of parents speaking Spanish	_____	_____	_____
Number of parents speaking English	_____	_____	_____
Number of teachers speaking Spanish	_____	_____	_____
Number of teachers speaking English	_____	_____	_____
Number of different teaching styles	_____	_____	_____
Number of representations of children's work	_____	_____	_____
Number of pictures of famous Hispanic persons	_____	_____	_____
Number of pictures of famous North American persons	_____	_____	_____

PART C

Alerta (Teachers College)

Directions: This section is an overall assessment of the frequency, intensity, amount, or number of things reflective of the model in use which took place in the classroom during the day. The ratings should be made at the end of a day's observations and incorporate all of the time you were actually doing observations. Make your judgement using the sampling strategies most appropriate for your site.

1. Estimate the total time each of these areas was in use:

_____ family corner	_____ table materials area
_____ blockbuilding areas	_____ music area
_____ sand area	_____ library area
_____ water area	_____ large muscle area
_____ art area	_____ outdoor area

2. How many distinctive culturally different language/ethnic markers are visible when observing materials in each major classroom area. Rate the area by circling a number.

Family corner	0	1	2	3	4	5	6	7	8	9	10
Blockbuilding areas	0	1	2	3	4	5	6	7	8	9	10
Sand area	0	1	2	3	4	5	6	7	8	9	10
Water area	0	1	2	3	4	5	6	7	8	9	10
Art area	0	1	2	3	4	5	6	7	8	9	10
Table materials area	0	1	2	3	4	5	6	7	8	9	10
Muisc area	0	1	2	3	4	5	6	7	8	9	10
Library area	0	1	2	3	4	5	6	7	8	9	10
Large muscle area	0	1	2	3	4	5	6	7	8	9	10
Outdoor area	0	1	2	3	4	5	6	7	8	9	10

3. - 6. Activity Groupings: How may times did a clearly demarcated activity occur where it was structures for a:

_____ large group (over 1/2 of children present)
 _____ small group (less than 1/4 children present)
 _____ for a first language Spanish-speaking children
 _____ for a first language English-speaking children

PART C (cont.)

_____ for second language Spanish-speaking children

_____ for second language English-speaking children

7A. For total morning minutes, how much time was spent by most children in:

_____ child-child interaction

_____ child-adult interaction

_____ child-materials interaction

7B. Overall, how wide was the range of children's interaction in each category?

1. Child-Child

1

2

3

4

5

Nearly all children
had a similar propor-
tion of time doing it

Fairly consistent
with some children
not similar

Great variability
in the amount of
time

2. Child-Adult

1

2

3

4

5

Nearly all children
had a similar propor-
tion of time doing it

Fairly consistent
with some children
not similar

Great variability
in the amount of
time

3. Child-Material

1

2

3

4

5

Nearly all children
had a similar propor-
tion of time doing is

Fairly consistent
with some children
not similar

Great variability
in the amount of
time

8A. Overall, rate each category of person for the proportion of Spanish or English spoken throughout the morning, in all settings.

A. Teachers

1

2

3

4

5

All or nearly all
Spanish

About equally mixed

All or nearly all
English

PART C (cont.)

B. Parents

1	2	3	4	5
All or nearly all Spanish		About equally mixed		All or nearly all English

C. Aides

1	2	3	4	5
All or nearly all Spanish		About equally mixed		All or nearly all English

D. Children

1	2	3	4	5
All or nearly all Spanish		About equally mixed		All or nearly all English

8B. Code switching: for each adult-to-child category, make a judgement concerning the extent of language-switching when talking with the same child or group.

A. Teachers

1	2	3	4	5
Same language used throughout interaction sequences		Some language switching, some consistency, in equal amounts		Constant use of language switching throughout interaction sequences

B. Parents

1	2	3	4	5
Same language used throughout interaction sequences		Some language switching, some consistency, in equal amounts		Constant language switching throughout interaction sequences

C. Aides

1	2	3	4	5
Same language used throughout interaction sequences		Some language switching, some consistency, in equal amounts		Constant language switching throughout interaction sequences

9. Rank-order what parents did most often in the morning.

_____ help teach

_____ provide community knowledge

_____ prepare materials

_____ provide input on program implementation

10. Teaching staff explicitly and overtly encourage children to use more language

1	2	3	4	5
Never	1 - 4	Often (5 - 8)	9 - 12	Very often (13+)

11. Staff explicitly and overtly encourages children to use materials in a variety of ways

1	2	3	4	5
Never	1 - 4	Often (5 - 8)	9 - 12	Very Often (13+)

12. Staff explicitly and overtly mentions and points out cultural diversity and differences in teaching situations.

1	2	3	4	5
Never	1 - 4	Often (5 - 8)	9 - 12	Very Often (13+)

13. Did you observe a planning session occur for the Head Start Staff?

Yes _____ No _____

14. How many minutes during the morning did teachers remain in direct involvement with children (direct interaction and contact)?

Total number of minutes observed _____

Total number of minutes in the morning class _____

Total number of teachers in classroom _____

Total number of aides in classroom _____

Total number of parents in classroom _____

Total number of ALL adults in classroom _____

Total number of children ever present _____

PART D

Alerta (Teachers College)

Directions: Using these general topics as a guide, inquire into the perceptions of the teacher, aides, and parents as to the day's events.

- A. Planning
- B. Daily Activities
- C. Meetings
- D. Role of Aides (or Parents)
- E. Overall View of Head Start
- F. View of Program
- G. Children's Attitudes
- H. Other

Classroom: _____

Date: _____

Activities:

1. _____
2. _____
3. _____

Time:

1. _____
2. _____
3. _____

Directions: This checklist should be used three times during the school day. The first time should be about a half an hour after the start of school. The subsequent two observations should take place at appropriate intervals (approximately 45 min. or so) that will optimize the opportunity to observe the model implementation. In the spaces provided above, describe the general activity during which the observation takes place (i.e., planning time, recall time, etc.), then fill the appropriate box for each item below.

Schedule & Organization

There is a schedule posted which includes:

1. large group, teacher-directed activities
2. small group, teacher-directed activities
3. small group, child-directed activities
4. reading and storytelling activities
5. songs and rhymes
6. activities in the first language
7. activities in the second language
8. activities in both the first and the second languages

Planned

Yes	No

Intended

Yes	No

Setting & Materials

Observation Periods

Page 127 C

	<u>A</u>			<u>B</u>			<u>C</u>		
	Not Present	Observed Not in Use	Observed In Use	Not Present	Observed Not in Use	Observed In Use	Not Present	Observed Not in Use	Observed In Use
Fantasy play area									
Block area									
Arts and crafts area									
Cooking area									
Discovery area									
Small group area									
Large group area									
Area for personal belongings									
Visitor's area									
Materials available in each area									
Materials related to the area									
Materials are within reach of children									
Materials are colorful									
Materials representative of different cultures									
Classroom clean (no obstructions interfering with people movement)									

Individuals

	<u>A</u>		<u>B</u>		<u>C</u>	
	Yes	No	Yes	No	Yes	No
Children using an area alone						
Children working in group						
Parents serving as teaching assistants						
Parent preparing materials						
Parent speaking Spanish with a child or group						
Parent speaking English with a child or group						
Aide speaking Spanish with a child or group						
Aide speaking English with a child or group						
Teacher speaking Spanish with a child or group						
Teacher speaking English with a child or group						
<u>Activities</u>						
Planning session of teacher/aide						
Assess children's cognitive style (testing)						
Arrange home visits						
Parents attend meetings						
Activities in first language						
Activities in second language						
Group activities						
Individual activities						

Directions: The purpose of Part B is to count elements identified as key features in the curriculum. Review the schedule and select three periods when instructional activities are clearly taking place. Sweeping with your eyes and moving around the room as necessary, count each specific variable listed below. Continue to sweep and move about the room until all of the questions are completely answered. Repeat these sweeps three times at the appropriate periods.

	A	B	C
How many distinct areas are there in the room?	_____	_____	_____
How many areas have materials?	_____	_____	_____
How many areas are gloomy?	_____	_____	_____
How many areas are clean and orderly?(no obstructions impeding movement)	_____	_____	_____
Number of children pursuing activities without adult direction	_____	_____	_____
Number of large, teacher-directed groups	_____	_____	_____
Number of small, teacher-directed groups	_____	_____	_____
Number of teacher/child dyads	_____	_____	_____
Number of child/child dyads	_____	_____	_____
Number of children alone	_____	_____	_____
Number of colorful materials visible	_____	_____	_____
Number of materials labeled in Spanish	_____	_____	_____
Number of materials labeled in English	_____	_____	_____
Number of parents in classroom	_____	_____	_____
Number of parents serving as aides	_____	_____	_____
Number of parents preparing materials	_____	_____	_____
Number of parents demonstrating specific skills	_____	_____	_____
Number of parents at meetings	_____	_____	_____
Number of different teaching styles being used	_____	_____	_____

PART C

Nuevas Fronteras

Directions: This section is an overall assessment of the frequency, intensity, amount, or number of things reflective of the model in use which took place in the classroom during a day. The ratings should be made at the end of a day's observations. Make your judgements using the sampling strategy most appropriate for your site.

1. Estimate the total amount of time each of these areas was in use.

_____ fantasy play area	_____ discovery area
_____ block area	_____ small group area
_____ music area	_____ large group area
_____ arts & crafts area	_____ area for belongings
_____ cooking area	_____ visitor's area

2. What was the average number of colorful materials in each area?

3. Estimate the total amount of time each type of activity below took place:

4. Large group, teacher-directed activities. _____

5. Small group, teacher-directed activities. _____

6. Number of different teaching styles observed. _____

7. Number of assessments and evaluations tests) of children's cognitive styles. _____

8. Language used most frequently by the teacher _____ Mixed, Spanish _____,
English _____ (100% total).

9. Language used most frequently by Aide(s) _____ Mixed, Spanish _____,
English _____ (100% total).

10. Language used most frequently by Parent(s) _____ Mixed, Spanish _____,
English _____ (100% total).

PART C (cont.)

1. 1 = Less than half of the areas in the room had bright and colorful materials.
2
3 = Half of the areas in the room had very bright and colorful materials.
4
5 = All the areas in the room had at least some bright and colorful materials.
2. 1 = A large group (1/2+ of children)-teacher activity never occurred.
2
3 = Two large group, teacher-directed activities occurred.
4
5 = Several (4+) large group, teacher-directed activities occurred.
3. 1 = A small group, teacher-directed activity occurred.
2
3 = A small group, teacher-directed activity occurred 4 - 5 times.
4
5 = A small group, teacher-directed activity occurred 8+ times.
4. Teacher-child individual dyadic learning/activity situations occurred:
1 = rarely or never
2
3 = fairly often (3+ times each hour) most of the morning.
4
5 = often (8+ times each hour) most of the morning.
5. Children were doing activity alone:
1 = rarely or never
2
3 = occasionally (2 - 3 children at a time)
4
5 = over half the class did individual activities most of the time

PART C (cont.)

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6. 1= Teachers used the same voice and discussion and persuasion styles in working with different children or at different times.
2
3 = some teachers varied voice and discussion and persuasion styles in working with different children or at different times
4
5 = teachers continually varied voice and discussion and persuasion styles in working
7. 1= Teachers never clearly used children's cognitive styles in altering their interactions.
2
3 = Teachers used some children's cognitive styles in altering their interactions.
4
5 = Teachers often clearly used children's cognitive styles in altering their interactions.
8. Number of children this week who were assessed for cognitive style at least once _____
9. Overall, rate each category of person for the proportion of Spanish or English spoken throughout the morning, in all settings:

A. Teachers

1	2	3	4	5
All or nearly all Spanish		About equally mixed		All or nearly all English

B. Parents

1	2	3	4	5
All or nearly all Spanish		About equally mixed		All or nearly all English

C. Aides

1	2	3	4	5
All or nearly all English		About equally mixed		All or nearly all English

D. Children

1	2	3	4	5
All or nearly all Spanish		About equally mixed		All or nearly all English

10. Number of minutes (approximately) parents were observed:
 _____ teaching _____ teaching assistance
 _____ prepare materials _____ provide input _____ other
11. Number of distinct episodes or activities involving pride in culture _____
12. Was there a session held to plan the day or part of the program? _____ Yes; No _____
13. Number of minutes teachers were not in classroom in direct contact and proximity with children _____.

PART D

Nuevas Fronteras

Directions: Using these general topics as a guide, inquire into the perceptions of the teacher, aides, and parents as to the day's events.

- A. Planning
- B. Daily Activities
- C. Meetings
- D. Role of Aides (or Parents)
- E. Overall view of Head Start
- F. View of Program
- G. Children's Attitudes
- H. Other

Socioemotional Rating Scales

Examiner's Rating of Socioemotional Behavior

Child's Name_____
Examiner's Name

INSTRUCTIONS: This form is to be filled out for each child after s/he has completed the 3rd and 4th testing sessions. Please rate the child according to how you perceived his/her behavior during these testing sessions. If you rate a child at either extreme for any dimension, please explain why.

1. Child demonstrates persistence in the testing activity.

ALWAYS USUALLY SOMETIMES SELDOM NEVER

2. Child cooperates with examiner during the testing situation.

ALWAYS USUALLY SOMETIMES SELDOM NEVER

3. Child waits for his/her turn in the testing situation.

ALWAYS USUALLY SOMETIMES SELDOM NEVER

4. Child is enthusiastic and involved in the task.

ALWAYS USUALLY SOMETIMES SELDOM NEVER

5. Child requires verbal reinforcement in order to maintain interest on task.

ALWAYS USUALLY SOMETIMES SELDOM NEVER

Teacher Rating of Socioemotional Behavior

Child's Name _____ Teacher's Name _____

INSTRUCTIONS: This form is to be filled out for each child. Please rate the child according to how you have perceived his/her behavior during school hours. If you rate a child at either extreme for any dimension, please explain why.

1. Child sustains interest in group activity.

ALWAYS USUALLY SOMETIMES SELDOM NEVER

2. Child works cooperatively with others.

ALWAYS USUALLY SOMETIMES SELDOM NEVER

3. Child follows directions.

ALWAYS USUALLY SOMETIMES SELDOM NEVER

4. Child shares and takes turns.

ALWAYS USUALLY SOMETIMES SELDOM NEVER

5. Child evidences pride in accomplishments.

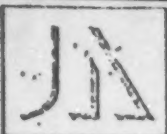
ALWAYS USUALLY SOMETIMES SELDOM NEVER

6. Child sees self as capable of mastering new situations.

ALWAYS USUALLY SOMETIMES SELDOM NEVER

7. Child communicates capabilities to others.

ALWAYS USUALLY SOMETIMES SELDOM NEVER



Juárez and Associates, Inc.

May 29, 1979

APPENDIX 4

Steve Martinez, Ph.D.

Project Officer

U.S. Department of Health, Education
and Welfare

Office of Human Development

Administration for Children, Youth,
and Families

400 6th Street, S.W., Room 5741

Washington, D.C. 20201

Letter to Project Officer Concerning Recruitment

Time Constraints

RE: Prepare a plan for gathering ethnographic data in the Bilingual/
Bicultural evaluation: Amendment No. 1 to Contract HEW-105-77-
1048

Dear Dr. Martinez:

As you know, we are very concerned that the delay in funding will place serious constraints on our ability to carry out the observational evaluation tasks as proposed. For this reason we want to suggest a series of adjustments in the proposed scope of work for your consideration. These date changes and task modifications are outlined below.

1. Recruitment

The most immediate impact of the delay in funding will be on the recruitment efforts. The success of the project depends on the quality of the staff recruited. Recruiting able and experienced field-workers, who must also be bilingual and willing to make a commitment for one year of work in the field, is very difficult. Obviously, the more time we have to recruit, the more carefully we can screen and select applicants for these positions. However, there is clearly not enough time to mount a major recruitment drive as originally proposed. Consequently, we have to focus our efforts on organizations and geographical areas where we think it is most fruitful to search. For example, since we would like to select people who are familiar with the cultural and linguistic characteristics of the replication sites, we will be contacting the appropriate departments in universities, colleges, and research organizations within a 50-mile radius of the sites. Advertisements will be placed in a few of the major journals and newsletters. A special emphasis will be placed on newsletters that try to reach Hispanic scholars.

Given our reduced time frame for recruitment and to attract more qualified applicants we suggest increments in the salaries proposed for each position. In order to facilitate the involvement of pre-doctoral dissertation level personnel, ACYF should facilitate or approve the use of information collected in the field as possible dissertation topics.

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2. Training

The quality of the training received by the field-workers is another critical component of the evaluation affected by the delays in funding. Clearly, the amount and scope of training are related to the experience and competency of the field-workers recruited and hired. As important as the characteristics of the field-workers is the amount of preparation time needed to adequately train them. Although the initial amount of training time may remain the same, the time needed to develop and carefully conceptualize a training program has been seriously constrained. Juárez and Associates recommends an important change in the original plan to help overcome the reduced planning time: the division of the training into two phases. This division of effort will reduce the amount of training needed in order to place the field-workers on site and will make planning more manageable. During the first phase, the field-workers will be trained in the skills needed to carry out the necessary initial tasks once they are placed on site. This will include training in collecting ethnographic field notes, observer ratings of classroom activities, and parental and teacher interviews.

This second phase of training will take place during a span of three weeks in January. The preparation of the observers to carry out event samples based on the systematic observations of children's behaviors in specific classroom contexts as well as recalibration of other observational procedures will be the focus of this phase. The division of effort and postponement of part of the training have several advantages. One, as stated above, is to make the effort more manageable given the severe time constraints. Second, it will allow much needed additional time to plan the second training phase. This planning will benefit from the field experience of the observers and from on-site visits by Juárez and Associates' staff during the first three months of implementation. Third, it will also allow the extra time to pilot test the observational instruments for the event samples. It also has the added advantages that both the participant researchers and the Juárez and Associates staff will be much more familiar with the sites and the curricula as implemented and will be better able to judge the amount of training required and the usability of the observational strategies (event samples) we have proposed.

3. Scope of Work

Juárez and Associates also recommends reducing the scope and the span of data collection. Originally, a time series design was proposed to collect implementation and classroom data during four specific two-week periods. Owing to the delays in funding, it is now suggested that this effort be reduced to three periods. One

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data collection period will occur during the onset of the program in the fall; a second data collection period (somewhat expanded) in the winter during February and March; and a final data collection period in late April or early May to coincide with the post-test activities. Again, these changes are recommended in order to adjust our efforts to the funding realities present and to enable the project to become more manageable.

To clarify, the assessment of implementation and the collection of parent and teacher data will take place at all eight sites. The collection of event samples and ongoing ethnographic notes will be restricted to one site per model. Following upon discussions with the model developers, we suggest that the four participant research-intensive sites be the following: South Bronx, New York City (Teachers College), East Los Angeles (High/Scope), Rio Grande City, Texas (University of California, Santa Cruz), Corpus Christi, Texas (Amanecer).

4. Division of Labor

In yet another effort to make the evaluation task more manageable, it was decided to establish a clear division of labor between tasks. The following changes are recommended:

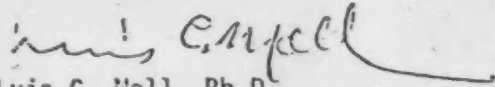
(1) Four interview supervisors will be trained at Juárez and Associates. These supervisors will be responsible for the hiring and training of two local interviewers at each non-participant research site, as well as the coordination and supervision of activities related to the collection of parental and teacher interviews. These supervisors will also remain on-site to collect the initial implementation data. At the remaining four sites, the participant researchers will be supervising the collection of parent and teacher data. This will provide them with the opportunity to identify an adequate sub-sample of families for more intensive follow-up in the months to come.

(2) Eight supervisors will be hired and trained by Juárez and Associates. As with the interview supervisors, these people will be responsible for the hiring and training, in this case, of four local testers at each site, as well as the supervision of testing for both treatment and control children. In our view, removing the responsibilities of test supervision from the participant researcher will enable the training of these field-workers to focus more thoroughly on the observational skills necessary to do the job.

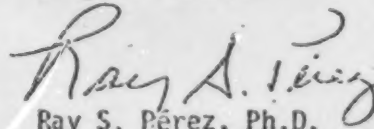
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The above are our most immediate worries. We feel that most of the observational tasks that have been proposed can still be implemented if realistic adjustment in the planning and data collection efforts are made.

Sincerely,



Luis C. Moll, Ph.D.
Project Director



Ray S. Pérez, Ph.D.
Co-Project Director

UNIVERSITIES

INDIVIDUALS

AFFILIATIONS

One Hundred Universities
Were Contacted

Oscar Alers

Dr. Carlos Arce

Esteban Arvizu, Director

Arnaldo Benavides

Robert Carroasco

Dr. Fred Erickson

Teresa Escobedo, Ph.D.

Dr. Rosa Estades

Larry Estrada

Dr. Susan Florio

Dr. Phil Garcia

Dr. Judith Guskin

Dr. Carlos Haro

Dr. Eduardo Hernández-Chávez

Dr. Hugh Mehan

Dr. Arnaldo Padilla

Dr. Pedro Pedraza

Prof. Hector Soto Pérez

Dr. Lloyd Rogler, Director

Ramona Salazar

Aspira, New York

Project Director
National Chicano Research Network
Institute for Social Research
University of Michigan

Cross Cultural Resource Center
California State University at Sacramento
Department of Anthropology

Pan American University

Harvard University

University of Illinois, Urbana

Department of Curriculum & Instruction
University of Texas

Aspira, New York

Chicano Studies
Loyola Marymount University

University of Illinois, Urbana

University of Illinois, Urbana

University of Wisconsin, Milwaukee

Associate Director
Chicano Studies Center
University of California, Los Angeles

Stanford University

University of California, San Diego

University of California, Los Angeles

Center for Puerto Rican Studies
New York

Chicano Studies Department
California State University, Los Angeles

Hispanic Research Center
Fordham University

Spanish Center, Milwaukee

Sources Contacted as Part of Recruitment Effort

APPENDIX 5

UNIVERSITIES	INDIVIDUALS	AFFILIATIONS
One Hundred Universities Were Contacted	Dr. Isaura Santiago Dr. Robert Stealce Dr. Henry Trueba James A. Vasquez, Ph.D. Director Dr. Carlos Velez	Columbia University University of Illinois, Urbana Institute for Cultural Pluralism San Diego State University Center for Chicano Studies University of Washington University of California, Los Angeles

APPENDIX 6

Job Descriptions and Rating Form for Participant
Researcher Selection

Juárez and Associates, Inc.

Coordinator of Participant Researchers

A full-time coordinator of fieldworkers is needed to coordinate data collection, data handling, data analysis, and reliability analysis for a national evaluation of bilingual preschool programs. This position is contingent on government funding.

I. EDUCATIONAL BACKGROUND

The coordinator must have a Ph.D. in either anthropology, education, linguistics, psychology, or sociology. S/he must have had extensive experience with both qualitative and quantitative data analysis techniques, and experience in educational settings is highly preferred.

II. EXPERIENCE

- A. Appropriate experience in child development settings, particularly preschool contexts.
 - 1. Experience with young children, ages 3-5.
 - 2. Experience with teachers and parents of young children and/or appropriate personnel responsible for young children.
- B. Experience with community based social-service delivery programs.
- C. Experience with the development and conduct of field work in educational settings.
- D. Experience with the development of procedures for informal and formal quantitative and qualitative observational methods.

III. REQUIREMENTS

Since the coordinator is responsible for overseeing data collection of preschool bilingual bicultural programs, it is necessary that s/he be bilingual/bicultural in Spanish and English. S/he must also be willing to travel.

IV. SALARY

\$18,000-\$20,000 per year plus medical and dental insurance.

JUAREZ AND ASSOCIATES, INC.

EVALUATION RESEARCH POSITION

Four full-time researchers are needed for a one-year period beginning July 1979 for an evaluation of Head Start Bilingual Bicultural Curriculum Development Projects. Data collection procedures include formal and informal observations, interviews, ratings, and compilation of ethnographic field notes and daily logs. This position is contingent on government funding.

I. Educational Background (preferred)

A minimum of an MA degree in a social science (i.e., anthropology, education, linguistics, psychology, or sociology) or equivalent field experience, with an interest in child development, early childhood education, and bilingual education. Preference will be given to pre- and post-doctoral students in the above-mentioned academic disciplines.

II. Experience (preferred)

- A. Appropriate experience in child development settings, particularly preschool contexts:
 - 1. Experience with young children, ages 3 to 5.
 - 2. Experience with teachers and parents of young children and/or appropriate personnel who assume responsibility for young children.
- B. Experience with field or experimental research focusing on young children.
- C. Experience with community-based social service delivery programs.

III. Responsibilities

- A. Maintain field notes according to a semi-structured set of domains and keep a daily account of the activities in the Head Start center.
- B. Interview teachers and administrators at a Head Start site.
- C. Conduct formal and informal observations in a Head Start center of selected children and contexts.
- D. Conduct home observations and parent interviews with families in the non-Head Start comparison group and with a sample of families of Head Start children.
- E. Act as a liaison between the evaluators (Juárez and Associates) and a Head Start site.

IV. Requirements

- A. Since the researcher will be collecting data at a bilingual/bicultural program in which the majority of the children will be Spanish speakers, it is necessary that he/she be bilingual and biliterate in English and Spanish.
- B. The researcher must be willing to live in the community surrounding the Head Start center. (Tentatively, the four sites will be in Corpus Christi and Rio Grande City, Texas; Los Angeles, California; and New York City, New York.)

V. Salary Range

Negotiable, depending on past experience, educational level, and comparable job experience.

Send résumé to:

Dr. Luis C. Moll or Dr. Ray Pérez
Juárez and Associates, Inc.
1100 Glendon Avenue, Suite 2005
Los Angeles, California 90024

SHORT-TERM RESEARCH POSITION

Four full-time researchers are needed for approximately two months beginning in August 1979 to conduct classroom observations and parent interviewing as part of a national evaluation of pre-school bilingual programs. This position is contingent on government funding.

I. Educational Background

A minimum of an MA degree in a social science (preferably education, psychology, or TESL) or equivalent field experience, with an interest in child development, early childhood education, and bilingual education.

II. Experience (preferred)

A. Appropriate experience in child development settings, particularly preschool contexts.

1. Experience with young children, ages 3 to 5.
2. Experience with teachers and parents of young children.

B. Experience with observational research in classrooms.

C. Experience with formal interviewing.

III. Responsibilities

A. Supervise a team of parent interviewers at a Head Start center.

B. Interview teachers at a Head Start site.

C. Conduct formal observations of program implementation in particular classrooms within a Head Start center.

IV. Requirements

A. The researcher must be bilingual and biliterate in Spanish and English, as he/she will be collecting data at a bilingual/bicultural program in which the majority of the children are Spanish speakers.

B. The researcher must be willing to travel and to spend approximately one month in a Head Start center. (The four sites are tentatively planned to be in Laredo, Texas; Milwaukee, Wisconsin; New York City, New York; and Riverside, California.)

V. Salary range

Approximately \$6.00 per hour plus per diem and travel.

Send résumé by July 13, 1979 (please indicate that you are applying for position IR-2), to:

Dr. Luis C. Moll or Dr. Ray S. Pérez
Juárez and Associates, Inc.
1100 Glendon Avenue, Suite 2005
Los Angeles, California 90024

APPLICANT'S NAME _____

SITE _____

PARTICIPANT RESEARCHER VITAE REVIEW RATING FORM

	Possible points	Your rat
I. Bilingual (Spanish/English) 35 points		
a) Extensive residence (5 mo. min.) in Spanish speaking country/community	10	_____
b) Advanced courses in Spanish	10	_____
c) Publications/presentations in Spanish	10	_____
d) Work with Spanish speaking organizations	5	_____
II. Education 15 points		
a) Ph.D. or ABD (social science)	3	_____
b) MA (Anthropology, education, sociology, TESL)	6	_____
c) MA (history, econ, linguistics, geo.)	3	_____
d) Related thesis/pubs/presentations	3	_____
III. Research Experience 50 points		
a) Research in Cross-cultural settings (other countries, minority, rural)	25	_____
b) Questionnaire construction	1	_____
c) Interview supervising	3	_____
d) Interviewing	3	_____
e) Observation		
1) In classroom	3	_____
2) Nonformal education	3	_____
3) Construction of checklists, rating forms, etc.	2	_____
f) Ethnographic		
1) School-community studies	3	_____
2) Classroom	3	_____
3) Local organization/family studies	2	_____
4) Oral History	2	_____
IV. Work Experience 30 points		
a) Teaching (Bilingual/ESL)	15	_____
b) Aiding (Bilingual/ESL)	5	_____
c) Organizing	4	_____
d) Social work	3	_____
e) Counseling	3	_____

TOTAL POINTS _____

COMMENTS: _____

Training Staff

List of Training Personnel

Thomas S. Weisner, Associate Professor of Anthropology and Psychiatry, University of California at Los Angeles, Consultant, Juárez and Associates.

Ronald Gallimore, Professor of Psychology in the Department of Psychiatry, University of California at Los Angeles, Consultant, Juárez and Associates.

Harold Levine, Assistant Professor of Anthropology in the Department of Education, University of California at Los Angeles, Consultant, Juárez and Associates.

Ray Chesterfield, Coordinator of Participant Researchers, Juárez and Associates.

Luis Moll, Project Director, Juárez and Associates.

Ray Pérez, Co-Project Director, Juárez and Associates.

Marlene Zepeda, Research Associate, Juárez and Associates.

The training staff consultants and Juárez and Associates staff alternated training participation based on their own expertise. At least two and sometimes three or four of the training staff worked with the trainees in all class sessions and discussions throughout the three week training period.

APPENDIX 8

Self-Assessment Scale

There are a variety of ways in which you can use this set of items to help monitor your present level of fieldwork skills. Your task is to prepare a short report for your field supervisors and for yourself, outlining your strong and weak points in each of the areas listed below. The supervisors will review your report and work with you during the coming months on specific field problems.

You might want to construct a five-point rating scale with Very Concerned at one end, and Very Confident at the other end, and rate yourself on each item. Writing a sentence or paragraph on each area would be another way of giving a picture of where you are. Use the following list to conceptualize for yourself your own fieldwork skills; use it to make suggestions as to how the field supervisorial staff and Juárez and Associates can work with you to improve on your weaknesses and capitalize on your strengths. Use it for making suggestions for changes and improvements in the training workshops.

Self-Assessment Scale

Personal Style

Role management and diplomacy/sensitivity
Perspective/sense of humor
Flexibility and tolerance
Memory
Curiosity/spirit of inquiry
Self-discipline/perseverance/self-control
Survival skills
Catharsis/introspection

Technical Skills

Note-taking skills/field vocabulary
Monitoring skills/noticing
Question-generating
Systematic/accurate
Promptness/reliability
Coding skills
Self-reliance in decision-making
Procedural/administrative skills
Interviewing styles

General Knowledge and Information

Specific knowledge about events/preparedness
Knowledge of Head Start & ACYF bureaucracy
Language skills in Spanish and English
Site and cultural sensitivity
Child development knowledge/four year olds

Bibliography

Campbell, D.T. Qualitative knowing in action research. Kurt Lewin Award Address, Society for Social Issues, September 1974.

Hollenbeck, Albert R. Problems of reliability in observation research. Observing Behavior, vol. 2; Data Collecting and Analysis Methods; ed. Gene P. Sackett, Baltimore, Maryland, University Park Press, 1978, pp. 79-98.

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